

2024–25 PTA Leader



LouisianaPTA.org



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VOLUNTEER FOR ADVENTURE

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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.

LOUISIANA PTA BOARD OF DIRECTORS

The LAPTA Board of Directors is made up of volunteers from Local PTA Units across the state. Most Board Members also serve at the local level. Contact the Board Members directly with any questions. There are several volunteer positions currently open. If you are interested in serving at the state level as a committee chair or committee member, contact LAPTA President at President@LouisianaPTA.org. Join us! I promise it's not overwhelming.

| Executive Committee | | |
|----------------------------|--|--|
| President | Beth Maillho <i>(Pending May 9 Election)</i> | President@LouisianaPTA.org |
| VP of Affiliation | <i>(To be appointed after May 9)</i> | Affiliation@LouisianaPTA.org |
| Treasurer | Ashley Snell | Treasurer@LouisianaPTA.org |
| Secretary | Latonyaw Thompson-Richmond | Secretary@LouisianaPTA.org |
| Committee Chairs | | |
| Membership | Peggy Mauer | Membership@LouisianaPTA.org |
| Arts Education/Reflections | Rachel Penwell | Arts@LouisianaPTA.org |
| Events | Tera Blackledge | Events@LouisianaPTA.org |
| Federal Legislative Chair | Giselle Allen | FLC@LouisianaPTA.org |
| Healthy Minds | Jessica Latin | HealthyMinds@LouisianaPTA.org |
| Leadership Development | Jennifer Hale | Leader.Develop@LouisianaPTA.org |
| Louisiana Lagniappe PTSA | Philip Davis | President@LagniappePTSA.org |
| Special Populations | Doris Glass-Heckert | Special.Populations@LouisianaPTA.org |
| Advocacy | OPEN | Advocacy@LouisianaPTA.org |
| Awards, Grants, & Contests | OPEN | Contests@LouisianaPTA.org |
| Historian | OPEN | Historian@LouisianaPTA.org |
| Inclusion (DIO) | OPEN | Inclusion@LouisianaPTA.org |
| LAPTA Staff | | |
| Administrative Director | Giselle Allen | Office@LouisianaPTA.org |

HISTORY OF LOUISIANA PTA

The Louisiana PTA (Parent Teacher Association) started more than 100 years ago with two segregated groups which did not unite until 1970. Please note that the name of the Shreveport group used words that we do not use in modern times. Check out the historical documents posted at LouisianaPTA.org/history which contain lots of details and pictures!

1910 – 70: History of the Black Group

- In 1910, a small group of black mothers met at the Peabody Elementary School and organized a Mother's Club which was in keeping with the purposes of the National PTA.
- In 1923, the Brock Street School organized the first PTA for Colored in Shreveport.
- In 1929, the Louisiana Colored Parent-Teacher Association is organized and joins the National Congress of Colored Parents and Teachers. Mrs. M. N. Ringgold serves as the first president.
- Until 1970, the Louisiana Congress of Colored Parent-Teacher Association supported the physical needs of underprivileged children, focused on character and spiritual education, child welfare, juvenile delinquency projects, community support during WWII, natural disaster recovery efforts, and provided drinking fountains, cafeterias, sidewalks, encyclopedias, and audio-visual equipment. The PTAs continued to grow in membership and in their advocacy efforts.



1918 – 1970: History of the White Group

- In 1918, the Spanish Flu Epidemic impacted Louisiana closing schools and halting education, and the New Orleans School Board proposed an overly aggressive recovery plan. In response, parents united and successfully changed the policy.
- In 1919, the New Orleans Council of Mothers formed and became part of the National Congress and Parent-Teacher Associations.
- On **February 9, 1923, the Louisiana Congress of Mothers and Parent-Teachers Associations was founded** and affiliated with National Congress. Mrs. Virgil Brown served as the first president with 40 local units and more than 2,000 members.
- Until 1970, the LA Congress of Mothers and Parent-Teacher Association grew throughout the state, adopted resolutions, and influenced legislative action in the areas of childhood literacy, preventive health actions, the juvenile justice system, teachers' pay, and distribution of public school funding.



1970 – Present: Unification of the Two Groups

- On November 24, 1970, the Louisiana Congress of Parents and Teachers, Inc., a predominately black member group, and the Louisiana Parent-Teacher Association, an all-white member group sign a merger agreement in New Orleans during the 41st Annual Session of the Louisiana Congress of Parents and Teachers, Inc. which was commonly called Louisiana PTA. *Pictured right.*
- In 2020, the Covid-19 Pandemic closed brick and mortar schools. PTAs worked with community agencies to provide meal pick-up sites and deliveries for children. In 2022, PTAs worked to rebuild and provide stability and resources to children, families, and educators returning to in-person learning.
- On February 9, 2023, Louisiana PTA received a Commendation from the Louisiana Governor celebrating 100 years of service to the families and communities of Louisiana.
- On March 25, 2023, Louisiana Lagniappe PTSA was chartered as the first state-wide unit in Louisiana.
- **The rest of the history has yet to be written. It needs you, your impact, and your support!**



LOUISIANA PTA OFFICE

All Local PTA Units in Louisiana are affiliates of Louisiana PTA (LAPTA) and National PTA. The Louisiana PTA Board of Directors (BOD) serves as a resource and support for local units. Thank you for joining PTA as we work to make a difference in our communities. PTA focuses on making every child's potential a reality by strengthening education and taking a comprehensive approach to community success. The LAPTA office is located at **1131 N. Causeway Blvd, Suite 306, Mandeville, LA 70471.**

WHAT DOES LAPTA DO?

- Makes every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Advocates for children at the local, state, and federal levels, including the National Legislative Conference in Washington, DC with the members of Congress.
- Assists Local PTAs in building community through programs that promote student achievement, creativity, and inclusiveness.
- Makes sure Local PTA Units have the same purposes and principles as National PTA.
- Ensures Local PTA Units operate according to National PTA's vision, mission, values, policies and legislative and advocacy priorities, positions, and resolutions.
- Aids the local units in maintaining compliance with National PTA, LAPTA, and IRS rules and requirements.
- Forwards the National PTA dues portion from Local PTA Units' dues submitted to LAPTA.
- Represents all Louisiana PTA members by participating in and voting at the National PTA Convention.
- Judges the annual Louisiana State Teacher of the Year Award.
- Member of Louisiana Partnership for Children and Families.
- Hosts LAPTA Leadership Training in August and privately throughout the year for individual PTAs as needed.
- Offers LAPTA grants to help fund Local PTA Units in providing engaging, educational, and fun opportunities for children, families, and communities.
- Assists PTA leaders if challenges occur in accomplishing the primary mission of their unit.
- Helps create new PTA units and reinstate unaffiliated units.
- Implements National PTA Reflections Program and awards state winners.
- Holds the annual General Membership State Meeting and Children's Awards Program.



MISSION PARTNERS OF LAPTA

Mission Partners are organizations dedicated to enhancing the well-being of children, sharing a common mission with the PTA. These kindred associations and coalitions encompass a wide array of entities, such as teacher or librarian groups, foster care organizations, mental health advocacy groups, and many others. If you're interested in becoming a Mission Partner or seeking additional information, see LouisianaPTA.org/missionpartners. Our current Mission Partners include:

**ON OUR
SLEEVES**[®]

The Movement for Children's Mental Health

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



Seymore D'Fair
EDUCATION FOUNDATION
PREVENTION COALITION

Seymore's Foundation operates under the Community Drug-Free Support Program. The coalition between many national programs provides a unified community force that promotes healthy lifestyle choices and focuses on prevention and reduction of substance use and other negative risk behaviors affecting children. They do their annual Red Ribbon Week theme. For details, see SeymoresFoundation.org.

**Louisiana
Partnership**
for children & families

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


voter voice

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

FRIENDS OF LAPTA

Louisiana PTA is financially supported by its Friends of LAPTA who help us achieve its mission and vision of supporting all children and families. As a 501(c)(3) nonprofit, LAPTA offers different avenues to help all children reach their potential by utilizing 54 grants, more than 225 awards, and dozens of programs for teachers, students, and local PTAs. The innovative programs and grants focus on topics such as STEM, literacy, mental health, student leadership, comprehensive arts programs, healthy earth, anti-bullying, anti-drug, sustainability, inclusion, diversity, internet safety, community outreach, and much more. **Can you get behind these successful programs?**

Philanthropic work, especially when it involves children and their education, makes a significant impact on the community. Friends of LAPTA join forces with LAPTA's nonpartisan, nonsectarian, and noncommercial advocacy work. Contact LAPTA to discuss what works best for you among the different partnering opportunities. Find the Package Levels and their perks and benefits. To become a Friend of LAPTA, see LouisianaPTA.org/friends.

LAPTA sincerely appreciates your time and resources and looks forward to getting to know you better. Everyone on our Board of Directors is a volunteer because we all believe in our mission that much!

ABOUT NATIONAL PTA

In 1897 when Alice McLellan Birney and Phoebe Apperson Hearst decided that someone should speak out on behalf of children, they founded the National Congress of Mothers which later became PTA. The [Parent Teacher Association](#) stands as the oldest and most extensive child advocacy association in the United States. Within its ranks, PTA unites millions of parents, teachers, grandparents, caregivers, foster parents, and other dedicated adults who are deeply committed to enhancing the education, health, and safety of all children. Together, they speak with one resounding voice in unison, advocating for every child's well-being. The National PTA Office is located at 1250 North Pitt Street, Alexandria, VA 22314, or call 800-307-4PTA (4782).

For more than 125 years, PTA advocacy has resulted in many changes such as creation of kindergarten classes, child labor laws, public health service, juvenile justice system, mandatory immunization, and the school lunch program. Today, PTA continues to advocate for all children, to press for adequate, equitable, and sustainable school funding, to create safe and healthy communities, and to make every child's potential a reality.

PTA empowers parents by providing them with a platform and resources to collectively influence decisions impacting children across schools, districts, states, and the nation. PTA extends invaluable benefits including:

- Access to an array of national programs, expert insights, and readily available resources.
- Timely updates and guidance through various channels like newsletters, PTA.org, *Our Children* magazine, and a comprehensive Local PTA Leader Toolkit.
- Opportunities for leadership development via webinars and e-learning courses.
- Availability of grants, amounting to millions of dollars, aimed at bolstering PTA capabilities and skills.
- The chance to attain prestigious national awards.
- Cost-saving benefits through partnerships with national retailers and other PTA collaborators.
- Invitations to the annual PTA Convention and the Legislative Conference.
- Support services to assist in establishing and managing PTAs effectively.

The Local PTA Unit operates in harmony with the Louisiana PTA (LAPTA) and National PTA organizations. This alignment reflects shared missions, purposes, values, and standards upheld by the National PTA.

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

The Purposes of PTA are:

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

The Values of PTA are:

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

National PTA Standards for Family-School Partnerships

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

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

VOLUNTEER FOR ADVENTURE!



2024–25 PTA Leader



Section 2: President

LouisianaPTA.org/president



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JOIN THE PTA ADVENTURE

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IMPORTANT DOCUMENTS AND TERMS

Local PTA Units fall under Louisiana PTA's tax umbrella and are classified as **tax-exempt 501(c)(3) nonprofits** under the US Internal Revenue Code. See LAPTA Toolkit: Treasurer for details.

- **PTA** stands for Parent Teacher Association and was established in 1897.
- A **charter** is issued when a group completes the requirements for organization as a PTA including approval of the Bylaws. A charter is evidence that the PTA is a unit of Louisiana PTA.
- **Bylaws** provide the rules for the PTA. They describe the rights and duties of the members and are the backbone of the PTA. LAPTA rules require units to review their Bylaws, update them if needed, and submit them to the LAPTA for approval every three years. It is important to know the Bylaws and use them often. Annual review of the Bylaws ensures that they reflect the way the PTA functions.
- **Employer Identification Number (EIN)**, also known as a Tax Identification Number, is a nine-digit number assigned to business entities by the Internal Revenue Service. A unit's EIN identifies it as a nonprofit organization. The President may contact LAPTA if they do not know their EIN or to verify its nonprofit status.
- **Local Unit Registration Number (LUR #)** was issued to each Local PTA Unit when the charter began. It is also known as a National PTA ID#. This number never changes and should be kept permanently.

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:

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

ESSENTIAL KNOWLEDGE

The role of the President within the Local PTA Unit is pivotal, serving as the presiding officer responsible for overseeing both the Board of Directors (BOD) and General Membership Meetings. In this capacity, the President bears the crucial responsibility of thorough preparation. This includes the distribution of all relevant materials to the appropriate officers or committee chairs, acting as a vital link between the PTA and the school principal. The President collaborates closely with fellow Board Members to effectively steer the PTA's affairs. The term of office commences and concludes in alignment with the fiscal year, as specified in the Bylaws, typically spanning from July 1 to June 30. The success of the administration hinges on the active participation and cooperation of officers, committee chairs, and members alike.

It is essential to recognize that the Local PTA Unit, along with its members, constitutes an integral part of both the Louisiana PTA (LAPTA) and the National PTA. Rather than mere numbers, the members serve as the bedrock of the

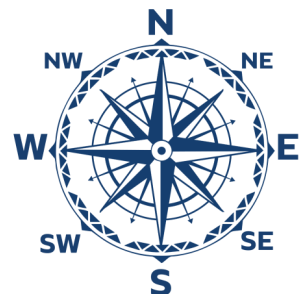
PTA. Building a well-informed team of individuals dedicated to the welfare of all children should be the primary objective. A membership actively engaged in both the school and the broader community lays the groundwork for the betterment of future generations. Embracing a perspective that extends beyond parents and teachers to encompass the entire community opens doors to a multitude of opportunities. By expanding its membership base, the association's collective voice gains strength, ensuring that policymakers at all levels are attuned to a resounding and unified call for the well-being of all children.

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

- **Nonpartisan:** PTA takes a stand on issues and principles, not on candidates or political parties. Issues may become identified with partisan politics because of the differing approaches to the solution, but the basic principles involving the welfare of children are matters of public concern and, therefore, PTA business.
- **Nonsectarian:** PTA welcomes into membership people representing a diversity of cultures, ethnicities, and political and religious beliefs. Membership in PTA is open, without discrimination, to anyone who believes in and supports the mission and purposes of National PTA.
- **Noncommercial:** The name "PTA" (a registered service mark) or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services. This policy should be applied with judgment, discretion, and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups. Before accepting donations of goods or services, a PTA association, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

School board leadership is a vital interest to all PTA members. To help the people of the community ascertain the qualifications of the candidates for the school board, a Local PTA Unit may sponsor a public meeting. For details on hosting a public forum, see *LAPTA Toolkit: Advocacy* or LouisianaPTA.org/advocacy.

Planning and promoting PTA programs and events constitutes a fundamental duty within the realm of PTA. This crucial task serves as the pathway toward realizing our objectives as dedicated advocates for children and ardent supporters of public education. PTA programs are not just events; they are dynamic tools employed to educate our members and foster a sense of community, uniting individuals from diverse religious, cultural, economic, and political backgrounds under a common banner: the well-being and prosperity of our children. To see the comprehensive programs offered for free by National PTA, visit PTA.org/programs.



In the contemporary landscape, PTA programs have evolved to be both innovative and deeply meaningful. They are instrumental in imparting knowledge, facilitating connections, and engendering unwavering support for the children and families whom the PTA serves. It is essential to recognize that no other organization comprehensively fulfills this vital function as the PTA does.

These programs play a multifaceted role. Firstly, they serve as informative platforms, keeping the membership well-informed about pertinent issues and developments within the education sector. Secondly, they function as educational tools for parents, equipping them with valuable insights and skills to navigate the complexities of their children's educational journeys. Most importantly, these initiatives weave a tapestry of community that extends far beyond the confines of individual school involvement, uniting neighbors and families in a shared commitment. It is well-documented that increased family engagement directly correlates with elevated student achievement and stronger bonds between families and schools. Therefore, PTA programs not only enrich the lives of children but also fortify the essential connection between home and school.

For more details on available PTA programs, please refer to the section titled "Pick Your PTA Programs" later in this section. Together, as members of the PTA, we can continue to make a profound and lasting impact on the lives of all children and the future of public education.

GETTING STARTED

Upon assuming the role of President, it's imperative to kickstart organizational efforts promptly. Initiate a dialogue with the outgoing President to establish a formal transition date for the records. Facilitate meetings between Board Members and their predecessors to hand over Procedure Binders and pertinent information. Remember to request and examine the Bylaws (LouisianaPTA.org/bylaws) to ensure they are up to date which expire every three years.

To streamline the workflow, set up a dedicated workspace for presidential duties. Create folders on both your computer and cloud storage for efficient file sharing. Invest time in organizing your physical workspace at home where your Presidential binder and files will be stored. Stay well-informed and connected within the PTA community by exploring resources like LouisianaPTA.org, PTA.org, and consider joining the PTA Leader group on Facebook to engage with fellow PTA leaders. Immediately register at LouisianaPTA.org/register.

Financial Check Up: Coordinate with the new Treasurer to update the signatories at the bank with new signers at the beginning of the fiscal year. Authorized bank signers may have debit cards issued in their name and the name of the PTA if the local school board allows it (not permitted in Caddo Parish.) Facilitate, if necessary, arrangements for documents to be delivered to the Audit Committee. See *LAPTA Toolkit: Treasurer* for financial details.

Starting Your PTA Work: The newly elected President should call and conduct a meeting with an agenda of the newly elected officers within 30 days of the election. Schedule a planning meeting for the Board of Directors (BOD). The BOD includes the elected officers (President, Vice-President(s), Treasurer, and Secretary), the principal, parliamentarian, Standing Committee chairs, and additional committee and chair positions such as historian, faculty representative, and student representatives. The Bylaws contain many job responsibilities, timelines, and due dates. Reviewing them together gets everyone on the same page with the same expectations. Review the current Bylaws and create the Standing Rules with the entire Board. Determine the goals for the year and the PTA programs to be implemented. Make sure Board Members know to check with the President before speaking on behalf of the PTA, before sending correspondence, or before discussing PTA business with the principal. When filling open positions on the BOD, strive for a balance of experienced and new members who represent campus demographics. All Board Members should submit their names and contact information as soon as possible each year at LouisianaPTA.org/register.

Meet with the principal to discuss school plans for the year and keep them informed of PTA activities throughout the year. Establish a calendar in cooperation with the principal to include school holidays, Board meetings, General Membership PTA meetings, PTA special events, election dates, Budget and Nominating Committee dates, PTA program deadlines, PTA Founders' Day on February 17, membership dues deadlines, membership Awards deadlines, LAPTA grant deadlines, LAPTA Leadership Training (required), and National PTA Conventions and Legislative Conferences. Reference the LAPTA Calendar.

See the end of this section for the *President's Duties Checklist*. LAPTA also recommends that the President review all sections of the LAPTA Toolkit which are posted at LouisianaPTA.org/toolkits.

PRESIDENT'S BINDER

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

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

BUILDING THE BOARD OF DIRECTORS (BOD)

There are two primary categories of PTA committees: **Standing Committees**, which engage in continuous year-round activities, and **Special Committees**, which focus on specific short-term tasks. Note that the President is a member of all committees except some Special Committees. See more in the *LAPTA Toolkit: Board of Directors*.

The number of Standing Committees required to effectively handle the tasks of the PTA relies on several factors, including the size of the membership, the scope of programs and activities, and the interests of the community. Following the election, the newly appointed President convenes a meeting with the recently elected officers to designate chairs for the Standing Committees and address any vacant positions. These appointments are subject to approval by the BOD.

To identify the specific committees and their responsibilities, refer to the Bylaws which are on file with LAPTA. It is crucial that the committee chairs represent a diverse cross-section of the membership enlisting both experienced and new members. To ensure a well-rounded selection, recommendations should be sought from various sources, including past and current Board Members, the principal, teachers, office staff, and the membership at large. The PTA is an inclusive organization that welcomes participation from all individuals. Efficiently filling all Board positions promptly allows everyone to participate in LAPTA training in August and provides ample time for planning the upcoming year's activities. It is acceptable to have a few open Board positions to encourage newcomers to become involved.

Leadership potential blossoms, enthusiasm for the PTA grows, and the scope of PTA activities widens when committee members embrace diversity, access valuable resources like the LAPTA Toolkit, utilize PTA.org for information, gain familiarity with the PTA Purposes, and engage in productive collaboration with BOD to achieve shared objectives. Tailor committees to align with the unique requirements, initiatives, and endeavors of the Local PTA. Use only those committees that are needed. The following are some suggestions.

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

The **principal** holds a vital role within the BOD and often serves as the sole constant presence in a dynamic leadership team. Cultivating a strong collaborative relationship between the principal and a thriving PTA can significantly enhance the educational environment for both students and families. Regular communication and cooperation between the PTA President and the principal are essential for the well-being of all parties involved. It's important for Presidents to recognize that they are guests in the principal's school, while the principal should also acknowledge that the PTA operates under its Bylaws, which may impose limitations on its response to certain school requests. Refer to the "Dos and Don'ts of Partnering with Administrators" later in this section. Additionally, it's worth noting that a **teacher** may serve on the BOD, and in the case of PTAs, a **student or Student Council** may also be part of the BOD. Detailed advice on interacting with teachers can be found in the "Dos and Don'ts of Partnering with Teachers" section later in this section.



To ensure **effective communication with the BOD**, consider utilizing helpful apps like GroupMe or Band App. Board Members should use PTA email accounts that are passed down from year to year, rather than relying on personal emails. Furthermore, it is the responsibility of the President, Treasurer, and Secretary to maintain a record of all passwords and recovery information for these accounts.

PICK YOUR PTA PROGRAMS

Achieving success in PTA hinges on wholeheartedly embracing the PTA's core mission: to make each child's potential a reality. The National PTA Programs serve as invaluable conduits, offering access to a plethora of engaging, educational, and enjoyable opportunities. These programs not only serve as a source of inspiration but also as a means to acknowledge and influence the lives of all students and their families. The array of programs available equips Local PTA Units to leave a significant mark within their communities.

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

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

LEADERSHIP DEVELOPMENT & TRAINING (REQUIRED)

All elected officers are required to annually complete 4 credits of PTA training. Proof of training is required for Active Affiliation which is detailed at LouisianaPTA.org/affiliation. All BOD members are encouraged to receive training. They should understand the other positions and roles within the BOD. Sources for training are:

- 1) **LAPTA Leadership Development Days:** In-person training and development in southern and northern Louisiana in August. Make sure all officers register every year with LAPTA at LouisianaPTA.org/register.
- 2) **LAPTA Zoom Training Meetings** are held in September. The recordings are posted at LouisianaPTA.org/training for self-guided training.
- 3) **LAPTA Individualized Training:** LAPTA also offers one-on-one training as needed. Contact LAPTA President at President@LouisianaPTA.org to schedule a meeting.

VOLUNTEER FOR ADVENTURE!

FINANCES

Each PTA is required to establish a budget that must gain the approval of its General Membership in the beginning of the year. Before this approval is obtained, the PTA may not exceed the allocated amount designated for "Startup Funds" in the previous year's budget. An essential component of the budgeting process is determining the goals of the PTA, and it is imperative that the allocation of funds within the budget aligns with these established objectives. Once drafted, it is then presented by the Treasurer to the BOD for their input before being brought before the General Membership for their approval. The budget is adopted with a majority vote of the members during the General Membership Meeting. To facilitate comprehensive discussions and the possibility of amendments, the budget is presented item by item. It is crucial to note that all expenditures made by the PTA must adhere to the budget approved for that particular year. It is not mandatory to spend all funds each year. Any remaining funds can be carried over to subsequent years.

Amending the Budget: The budget serves as a projection of anticipated income and expenditures for the fiscal year. In cases where unforeseen expenses arise, revenue fluctuations occur, or a modification to an already approved expense is required, the budget necessitates an amendment. This amendment process calls for a vote from the General Membership, either during a Regular Meeting or a Special Meeting designated for this purpose. Any proposed additional expenditure or fundraising initiative that falls outside the existing budget parameters must first obtain approval before spending that money. To amend a previously adopted budget, a two-thirds majority vote is required in the absence of prior meeting notice, or a simple majority vote suffices if proper notice has been provided for the meeting.

PTA Books and Records: The Treasurer's role entails the meticulous upkeep of the PTA's financial records. These records encompass a variety of items including the checkbook, deposit forms, check requests, approved budget, budget reports, IRS tax filings, and others. It is advisable to utilize online accounting software such as MoneyMinder.com to facilitate these tasks. A similar but free version to MoneyMinder is WaveApps.com. There are no specific regulations imposed by the IRS, National PTA, or LAPTA that prescribe a limit on the amount of funds a Local PTA Unit can carry over from one fiscal year to the next. If a PTA consistently accumulates significant surplus funds, it may be advisable to reconsider the frequency and scale of fundraising activities to align revenue generation more closely with the program's financial requirements.

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

PTA Audit: The primary objective of an audit is to verify the precision of the Treasurer's financial records and ensure the organization's resources and finances are being handled with professionalism. A committee of three individuals, none of whom possess check-signing authority, can validate the records using the straightforward method outlined in the LAPTA Toolkit: Treasurer. The annual audit must be submitted to LAPTA by the end of October, and the annual results communicated to the membership.

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

Fundraising is not the primary function of the PTA. The true essence of PTA doesn't reside within its financial reserves but rather within the collective energy, ingenuity, and unwavering commitment of its members to enhance the well-being of children. Financial resources are used to support the initiatives of the PTA. It is vital not to engage in fundraising solely for the sake of accumulating funds. National PTA recommends a thoughtful approach when planning the year's activities by following the **three-to-one rule**: for every fundraising activity, there should be a minimum of three non-fundraising projects aimed at supporting children, teachers, parents, or others in advocating for improvements in the school environment.

FUNDRAISING STRATEGIES

These seven questions serve as a valuable framework for evaluating fundraising strategies and initiatives, ensuring they align with the needs of students, the school, and the wider community. Use these questions to guide the development of effective fundraising approaches that not only secure the necessary funds but also educate students about the importance of philanthropy.

1. What values provide the basis for why you are raising funds? It's crucial to focus fundraising efforts on a clear purpose. The first step is to identify the specific need, opportunity, or problem that requires attention. Fundraising should never be an end in itself. There must always be a compelling reason and need driving it. Once the problem and solution are identified, consider the values and concerns that potential donors should share to support this cause. Engage volunteers in identifying groups within the school and community that hold these key values and concerns. Finally, choose fundraising strategies that resonate with these identified values and effectively draw prospective donors' attention to the cause. People allocate their time and resources based on their values. Are the fundraising strategies aligned with these values, and do the volunteers fully grasp the underlying need?

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

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

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

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

6. Have you considered the integrity of businesses offering support? Collaborating with local corporations can be a beneficial fundraising strategy that showcases community support and raises awareness of the school's needs. However, it's crucial to carefully evaluate any company aligning itself with the school or PTA to ensure alignment with the organization's values and principles.

7. How will this fundraiser and the projects and programs it supports benefit the community? School fundraising initiatives should have a positive impact on the broader community. Improving schools directly enhances the community, but it's essential to illustrate how school and PTA projects connect to the world beyond the school. Whenever possible, clarify the connections between the project and the greater community.

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



MONEYMINDER AND CHEDDARUP

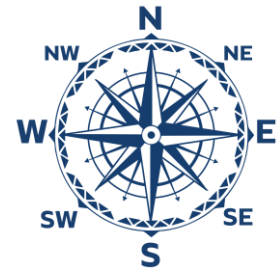
Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and to collect membership dues. While there are several platforms, LAPTA recommends and uses CheddarUp.com to collect membership dues and MoneyMinder.com to track finances. MoneyMinder and CheddarUp partnered with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

MoneyMinder.com is simple accounting software for volunteers and makes tracking expenses and deposits and running reports as simple as possible. It is also easily shareable from one Board to the next with continual access to past years. MoneyMinder has a new feature that allows you to e-file Form 990-N and 990-EZ directly to the IRS. **A free accounting alternative is the Wave App at waveapps.com.**

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

MEMBERSHIP DUES

Membership is the backbone of PTA. Submitting dues is required. Not submitting dues is fraud and puts the PTA at risk of losing its nonprofit status. Memberships are good for one year starting on July 1 and expiring on June 30. The amount of dues for different types of membership is listed in the Local PTA's Bylaws. When a member submits dues to the Local PTA Unit, it is required to submit \$3.50 per person in dues to LAPTA. This amount includes \$1.25 for LAPTA and \$2.25 that LAPTA forwards to National PTA. They are a member of their Local PTA Unit, LAPTA, and National PTA. Please note that National PTA will probably increase their dues in the near future. See LouisianaPTA.org/membership to submit dues. See the *LAPTA Toolkit: Membership* and PTA.org for ideas on membership campaigns.



MEETING TYPES

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

- **Executive Committee Meetings** consist of elected officers specified in the Bylaws.
- **Board of Directors (BOD) Meetings** are the elected officers, principal, parliamentarian, Standing Committee chairs, and other positions outlined in the Standing Rules such as faculty and student representatives.
- **General Membership Meetings** encompass all paid members who are in good standing with the PTA.

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

Virtual meetings are allowed. For General Membership Meetings, the first of the year and election meetings must be in person. For Board meetings, the first of the year meeting plus one other meeting must be in person. Virtual meeting guidelines are listed in the Bylaws. Meetings may be recorded by one Board Member for the purpose of accurately documenting business and then destroyed upon completion of the minutes.

ELEMENTS OF SUCCESSFUL MEETINGS

All meetings, regardless of their formality, encompass certain fundamental components essential for their effectiveness. One crucial element is the agenda, which sets the sequence of topics to be addressed. It is imperative to adhere to the agenda, addressing and concluding each item before moving on to the next one, as this promotes clarity and efficiency. Employing parliamentary procedure is essential to safeguard the rights of participants while facilitating productive discussions on the meeting's agenda. In the case of PTA meetings, they are governed by Robert's Rules of Order, Newly Revised as noted in the Bylaws.

Establish a consistent meeting schedule that accommodates the availability of both General Membership and Board of Directors, enabling individuals to plan effectively. Consider the possibility of arranging meetings on multiple dates or at different times to enhance attendance. Consult with neighboring PTAs, feeder schools, and community stakeholders to align schedules for better coordination.

The individual serving as the presiding officer should arrive punctually, possess a thorough understanding of the organization's Bylaws and parliamentary protocols, maintain composure, exhibit tactfulness, show appreciation, extend courtesy, embrace a charitable demeanor, and present themselves in a well-groomed manner. The President, or in the President's absence the Vice-President, assumes the role of the presiding officer. This individual officially starts the meeting at the designated time and proceeds with the agenda. The President utilizes an impersonal reference as "the chair" as the presiding officer in formal gatherings of the General Membership. In this capacity, the President refrains from participating in the substantive discussion and avoids expressing personal opinions. Instead, they facilitate the orderly conduct of business within the group. In smaller gatherings, such as meetings of the Executive Committee, the President may actively participate, and the adherence to parliamentary procedure may be less strict.

Preparing the Agenda: According to Robert's Rules of Order, Newly Revised, the Secretary is authorized to create the agenda. Nevertheless, many Presidents do it themselves. Prior to compiling the agenda, review the minutes from the preceding meeting to identify any unresolved business. Consult with officers and committee chairs to determine if they have reports to present. Ensure that the names of individuals scheduled to speak are included on the agenda. Refrain from calling upon anyone who lacks a report to present.

Quorum: In accordance with Robert's Rules of Order, Newly Revised, a quorum represents the minimum count of eligible voting members required for the legal conduct of business. Quorum for both BOD and Executive Committee meetings is 50% of the total Board roster plus one, or a majority. Do not count anyone more than once even if they hold multiple positions on the BOD. Quorum for General Membership Meetings is in the Bylaws. To establish quorum, every meeting should have the membership roster available and employ a sign-in sheet to document that quorum was met. There is a sample sign-in sheet in the Secretary Toolkit.

PARLIAMENTARY PROCEDURE

Parliamentary procedure is a consistent framework of regulations that oversee the operations of various organizations. These regulations serve to safeguard the rights of all participants, emphasize courtesy toward all members, and ensure impartial treatment. While it's not mandatory to be well-versed in every rule, possessing a fundamental understanding can greatly facilitate the efficient conduct of meetings. It's advisable to keep copies of the PTA's Bylaws and Robert's Rules of Order on hand during meetings for easy reference.

Parliamentary procedure mandates that all participants acknowledge the will of the majority and show respect for the opinions of the minority. The President, as the duly elected leader, is tasked with executing the PTA's will rather than imposing their own agenda upon it. It's crucial to remember that authority resides in the office, not in the individual holding it. All members hold equal status within the organization. No one has the right to do anything that prevents others from seeing or hearing the presiding officer or speaker. During meetings, no one has the right to converse, move about, or stand, except to address the presiding officer. If several members rise at the same time to claim the floor, the chair recognizes one and the others shall be seated immediately to be called upon as soon as possible if time permits.

A **motion**, also known as an "action," is a formal proposal presented to an organization, suggesting that it take specific actions or express particular viewpoints. The purpose of a motion is to introduce a matter for consideration during a meeting. There are six distinct steps involved in making a motion:

1. **Gaining the floor and stating the motion:** A member stands and respectfully addresses the chair by using the appropriate title. The chair acknowledges the member who wishes to speak. The member is then allowed to say their motion, such as "I move that..."
2. **Seconding the motion:** Another member must second the motion, indicating that more than one person is interested in the topic by stating, "I second the motion." Motions initiated in committees do not need a second.
3. **Restating the motion:** The chair formally restates the motion to the assembly which can be modified or edited.
4. **Discussion (or debate):** All comments and arguments should be directed towards the chair. This discussion alternates between pro and con speakers until no one wishes to speak or until someone moves to end the debate early. To end the debate, a member can say, "I move the previous question." This motion requires a second, is not open for debate itself, and necessitates an affirmative two-thirds vote.
5. **"Putting the Question" or Taking the Vote:** The chair reiterates the motion, specifies the voting method, and calls for both affirmative and negative votes.
6. **Announcing the results:** The chair announces the outcome of the vote (passed or failed) and explains the action the assembly will take based on the vote's result.

Motions should be presented in a clear and concise manner, focused on a single main idea. The appropriate language for initiating a motion is either "I move that" or "I move to." The individual proposing the motion usually initiates the discussion. In exceptional circumstances, the presiding officer can engage in discussion but must temporarily step down from the chair during the debate and voting process. The President is permitted to cast a vote on a pending question when their vote could potentially make or break a tie or alter the outcome. Additionally, the President may vote when an anonymous ballot is used to maintain confidentiality and to not influence others. The minutes record the person's name who made the motion but not the name of the second.

ORIENTATION MEETING

The initial BOD meeting serves as an orientation session for both new and returning members. This meeting informs and equips the BOD to fulfill their roles effectively within the organization. It encompasses the following key elements:

1. Warm welcome to all attendees and introduction of all Board Members.
2. Comprehensive overview of an effective and functional Board, discussion of meeting schedules, locations, attendance expectations, and guidelines for notifying the Board in case of absence.
3. Emphasize the significance of maintaining a procedure binder.
4. PTA Fundamentals of exploring the PTA's structure, policies, and procedures and reviewing the Bylaws and Standing Rules.
5. Clarification of reporting responsibilities (who reports what and to whom).
6. BOD roles and responsibilities which include collaborating with school administrators and other child-related stakeholders, attending PTA workshops and e-learning sessions, promptly responding to correspondence (emails, texts, and phone calls), and active participation in Board meetings.
7. Highlighting the membership policy mandating all Board Members to submit their membership dues.
8. Overview of the Deposit Form and Expense Form.
9. Presentation of the proposed PTA calendar for the upcoming period.
10. Sharing the Board roster, including email addresses and phone numbers.
11. Reviewing and signing of the Confidentiality, Ethics, and Conflict of Interest Policy.
12. Registration of the BOD with Louisiana PTA at LouisianaPTA.org/registration.

AGENDAS AND THE MINUTES

It is important to have an agenda to make sure business is conducted efficiently. The following is the normal order of business. *A sample agenda and sample meeting script are at the end of this section.*

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

Minutes

It is paramount to ensure the accuracy of meeting minutes. These minutes must be duly recorded in the official minute journal or typed on a computer with an external backup. Succinctness is key with a focus on outlining the actions taken. The minutes should encompass key details such as the nature of the meeting (e.g., Executive Committee, Board of Directors, General Membership, Special), the PTA's name, date, time, location, the name of the presiding officer, chair, or Secretary, and attendance (utilizing roll call for Board meetings). It should include the Secretary's Report and if the meeting's minutes were accepted or accepted with corrections. All motions must be properly recorded, noting the name of the motion maker, if it was seconded, and if the motion passed or failed. Other essential elements are the program topic, the presentation method, details about speakers and significant points discussed, and the time of adjournment. Approval of the minutes does not necessitate a formal motion. Once the "draft" minutes have been reviewed or presented, corrections are sought, and any corrections made, they then become the official record of the PTA. See the LAPTA Toolkit: Secretary for details.

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

Committee Reports

Occasionally, committees may find it necessary to update not just the BOD but also the General Membership on their progress. Typically, the chairperson delivers these updates. It's important to note that not all reports demand action. When a report solely provides information, there's no need for a motion to accept it. Instead, the report is presented, discussed, and then filed with the Secretary. However, if a report calls for the approval of the members, the person presenting it initiates the adoption process by making a motion. Since the motion originates from a committee, there's no need for a second. Once the motion is on the floor, it becomes open to debate and amendments just like any other motion.

Programs

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

Adjournment

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

ICEBREAKERS

To promote an inclusive PTA, use icebreakers to have members effortlessly engage with one another. Icebreakers are an enjoyable way for acquainting individuals and fostering a sense of belonging. This approach serves as an excellent kickoff for meetings, initiating participation and introductions before delving into the agenda. When selecting an icebreaker, consider the following factors:

1. **Primary Objective:** Is the main objective, for example, to facilitate better mutual understanding, infuse some enjoyable competition, or provide an opportunity for participants to acquire new knowledge?
2. **Inclusivity:** Meeting attendees usually possess diverse abilities, interests, and beliefs. Ensure that the icebreaker is accessible to all, allowing everyone to actively participate.
3. **Interactive:** Icebreakers excel at encouraging people to mingle and step outside of their comfort zones. Select an activity that encourages participants to establish new connections and relationships.

Icebreaker Examples:

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

LOUISIANA PTA
Established 1923

PROBLEM SOLVING

Addressing conflict within a Local PTA can be a time-consuming endeavor that can quickly deplete valuable resources. The majority of these issues tend to revolve around communication breakdowns. It is much better to engage in direct conversations with the involved parties rather than rely on emails or secondhand information to get to the root of the issue. When conflict is managed effectively, it can yield positive outcomes, such as fostering growth, enhancing communication, honing problem-solving skills, bolstering teamwork, and catalyzing change. The following steps are recommended for problem-solving within the PTA:

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

How to Handle Disruptions in Meetings

An informed and vigilant PTA can attempt to mitigate disruptions, although complete avoidance may not always be feasible. The presiding officer should maintain composure in the face of interruptions, allowing disrupters to finish before suggesting that the speaker be given the opportunity to complete their sentence or thought. It is customary within the group to show courtesy by refraining from interrupting speakers. If disruptions persist, refrain from engaging in a shouting match. In the case of whispered conversations in small groups, remain silent to regain the audience's attention and only resume speaking once the whispering subsides. If name-calling occurs, respond calmly with, "You are entitled to your own opinion, of course. Shall we continue?" When confronted with challenges to integrity, avoid defensiveness and emphasize that opinions differ from facts. Always maintain a sense of humor, as a well-timed humorous remark can deflate tension and diffuse challenging situations.

Parliamentary Procedure Tips

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

The Bylaws state that participation in making motions, engaging in debates, and casting votes is limited to members in good standing. Bring this to the attention of the group or individual who isn't a PTA member. The Secretary should maintain an up-to-date roster of members in good standing who are eligible to vote. In instances where discussions might become contentious, it is beneficial to initially establish and gain group consensus on debate guidelines. While nonmembers may be in attendance, it's essential to remember that the PTA retains the prerogative to confine the right to speak and vote exclusively to its members.

School Level Complaints

Occasionally, the PTA President or a Board Member may receive inquiries from individuals who have concerns or grievances related to school matters. It's important to clarify that the PTA does not have the authority to address or manage issues pertaining to the school or its staff. Parents and students possess certain rights and responsibilities, and the PTA can serve as an informational resource. However, for resolution, individuals are encouraged to adhere to the established procedures within the school district. Direct the concerned party to the school district's official policy on addressing complaints. Typically, the established "chain of command" is: 1. the teacher, 2. the principal, 3. the principal's supervisor, 4. the superintendent, and 5. the school board.

NEW Termination of Membership

The Local PTA Unit Bylaws Template from April 2024 include a provision on removing a member in Article V, Section 4. The person in question needs to have behaved in a way that damaged the value and goodwill associated with PTA or violated the purposes, policies, or Bylaws of PTA. Termination requires an affirmative two-thirds vote by LAPTA BOD. This is to be used with great discretion and much restraint.

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.



PRESIDENT'S CHECKLIST

Monthly Duties

- Organize and lead Executive Committee, BOD, and General Membership Meetings by creating agendas.
- Distribute and oversee the approval of the Treasurer's report and the minutes from the previous meeting.
- Ensure the timely submission of LAPTA dues (which includes National dues) and member rosters to LAPTA.

Familiarize yourself with the following:

- Review the Bylaws and Standing Rules to stay informed about upcoming mandatory business dates.
- Request a copy of your current Bylaws from Bylaws@LouisianaPTA.org.
- Get a copy of [Robert's Rules of Order, Newly Revised](#) or visit RobertsRules.com.
- Visit LouisianaPTA.org and go through all pages. Create an account at PTA.org for additional resources.

Get Organized and Begin Planning

- Call a meeting of newly elected officers within 30 days of election to appoint Standing Committee chairs.
- Ensure Board Members meet with their predecessors to exchange relevant information.
- Have all Board Members register with LAPTA at LouisianaPTA.org/register.
- Encourage Board Members to attend LAPTA Development Days and Training. (Required for officers.)
- Have Board Members subscribe to National PTA electronic publications at pta.org.
- Collaborate with the Board and the principal to assess needs and establish goals and objectives.
- Schedule a meeting with the principal to plan the yearly calendar and review PTA goals.
- Know the PTA's Federal Employer Identification Number (EIN) and Local Unit Registration (LUR#).
- Arrange for a meeting at the bank to change signers on the PTA's account. Call the bank for requirements.
- Organize the President's binder and Presidential digital folders.
- Monitor PTA social media accounts. Have at least two active administrators with full access for each account.

June/July/August

- Attend the National PTA Convention in June if the budget allows.
- Attend LAPTA Development Days and Training in August.
- Request the current Bylaws from LAPTA and ensure that each Board Member has a copy.
- Prepare an agenda for the first Board meeting.
- Review the LAPTA Records Retention Policy in the Secretary's Toolkit.
- Have the Board sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Verify the schedule of monthly Board meetings for the year.
- Review submission dates for insurance policy. Insurance for the PTA is required.
- Update and renew Articles of Incorporation Annual Report with Louisiana Secretary of State at geauxbiz.com.
- Form the Audit Committee to complete the annual Audit Report which is due to LAPTA at the end of October.
- Preside over the first General Membership Meeting to adopt the Budget, Annual Report, and Audit Report.
- Communicate PTA goals for the year to the membership.
- Intentionally reach out to new families at the school.
- Consider a Welcome Back to School Celebration for staff and families.
- Host a volunteer orientation.
- Create a Welcome Packet with a membership ask, calendar, PTA Programs, and more.
- Create or update the CheddarUp.com account for the year to offer online membership purchases and more.
- Form the Budget Committee to create the new budget on MoneyMinder.com or waveapps.com.

September/October

- Form the Bylaws Committee to review the Bylaws and recommend revision or amendments if needed.
- Complete the Active Affiliation Report at LouisianaPTA.org/affiliation due late October.**
- Share the LAPTA Training Zoom schedule with the Board of Directors. All are welcome to attend.
- Confirm the program for the next General Membership Meeting.
- Touch base with each officer/chair about upcoming duties or events.
- Share the *LAPTA Toolkit: Awards, Grants, and Contests* with the Board.
- Conduct the fall membership enrollment campaign. Submit member dues at LouisianaPTA.org/membership.
- Register for the National PTA Reflections program at LouisianaPTA.org/reflections.

November/December

- IMPORTANT:** Confirm that the IRS Form 990 was filed. This is due November 15 for most PTAs.
- Check-in with officers and committee chairs.

January/February

- Celebrate National PTA Founders' Day on February 17, 1897.
- At a General Membership Meeting, form the Nominating Committee as prescribed in the Bylaws.

Mardi

March/April

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

May/June

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



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 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.



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.

YEAR-END CHECKLIST & TRANSITION GUIDANCE

PTA leaders have a series of important tasks to accomplish before the school year concludes to ensure a seamless handover and to provide their successors with a solid foundation for the upcoming year.

- **Initiate a Meeting with the Successor:** It's crucial to meet with the successor as soon as possible. Give a timeline of the year's events, essential job details, a summary of the current status of various initiatives, and a review of the previous budget.
- **Conduct Elections:** Organize and hold elections promptly in the month designated in the Bylaws. Have the newly elected officers register with LAPTA at LouisianaPTA.org/register.
- **Submit Outstanding Membership Dues:** Pay outstanding dues at LouisianaPTA.org/membership.
- **Bank Account Transition:** Accompany the incoming Board Members to the bank and facilitate the transition of account signatures.
- **Verify Treasurer's Year-End Checklist:** Double-check that the Treasurer's Year-End Checklist has been meticulously completed to ensure that all financial matters are in order.
- **Close Financial Records by June 30:** As June 30 approaches, take the necessary steps to close out the financial records. Be sure that all reimbursement requests are submitted in a timely manner to facilitate the issuance of checks before the books are closed. Inquire about any outstanding checks.

Notes to pass on to successors:

- Things done during the term in office that the successor should know and practice.
- Things that *should* have been done that the successor should know and practice.
- Things that the successor should address during the first 30 days in office.
- Things that would instill an effective Board and help to conduct productive Board meetings.
- Final thoughts for the new leadership team's success.

The Outgoing Board should always:

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

The Incoming Board should always:

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

LOUISIANA PTA
Established 1923

SAMPLE AGENDA

Madison High PTA Board of Directors Meeting

January 19, 2030

AGENDA

Meeting called by Tera

Executive Board Members:

President: Tera

Treasurer: Carolyn

Vice-Presidents: Shelley & Beth

Secretary: Stephanie

Committee Board Members:

Membership: Katie

Volunteer: Sandra

Fundraising: Amy, Melanie, Christen

Hospitality: Jenn, Amy, Elizabeth

Room Mom: Kristy

Reflections Program: Amy

Beautification: Bessy

Uniforms: Caroline

Grants & Awards: Christie

Newsletter: Angie, Doris

Teacher Rep: Erin, Sarah

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

Secretary's Report – Minutes.....Stephanie

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

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

Principal's Report.....Mrs. Welch

Committee Reports

- Membership Committee.....Katie
- Volunteer Committee.....Sandra
- Fundraising.....Tera
- Hospitality.....Jenn
- Room Moms.....Kristie
- Reflections.....Shelley
- Art Parents.....Amy
- Beautification.....Bessy
- Library Committee.....Amy
- Newsletter.....Angie
- Uniforms.....Caroline
- Grants & Awards.....Christie
- Teacher Representative.....Sarah

Old Business.....Tera

New Business

- Upcoming Flyers/Events.....Beth

Important Dates

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

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

Adjournment.....Tera

SAMPLE MEETING SCRIPT

See [National PTA script](#) for further guidance including script for virtual meetings.

Call To Order (Required)

The President, as the chair, calls the meeting to order. The chair declares if a quorum is present, and the Secretary notes the fact in the minutes. See the Bylaws for quorum information. If the Secretary is not present, the chair appoints a member to perform those responsibilities for the meeting.

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

Opening (Optional)

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

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

Introductions for Special Guests (Optional)

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

Explanation of Meeting Technology (If Virtual Meeting)

PRESIDENT: "In order to make sure everyone is comfortable with our meeting technology, let's review a few options for the meeting (raising your hand, unmute, chat, time constraints, etc.) If we need to conduct a ballot vote, it will be (by email or by anonymous poll on the meeting platform)."

Explanation for Making a Motion (Optional)

"During this meeting, we follow these rules for motions. The chair gives the chance to speak to every member who wishes it. Pro and con speakers are given alternating opportunities to speak, if possible, and all speakers should tactfully be kept to rules of order and to the question. Each member has two opportunities to speak to the motion. A member may exercise their first opportunity to speak and then, after every other member has had the chance to speak, may speak only once more. All statements must be addressed to the chair and not to another member. The chair recognizes a member who has not previously spoken to the motion in preference to one who has spoken. The chair does not enter the discussion. Should the chair wish to debate, the chair will ask the Vice-President to preside. The President may vote when the vote would change the outcome (to make or break a tie) or when the voting is by ballot. Debate continues until no one wishes to speak or until someone moves to close debate. A member must seek recognition, properly make the motion, and acquire a majority vote to pass."

Secretary's Report (Required)

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

PRESIDENT: "_____, Secretary, will now read (or distribute) the minutes from the last meeting." (Secretary reads the minutes or references that the draft minutes were distributed for review.) PRESIDENT: "Thank you. Are there any corrections to the minutes? [PAUSE] Hearing none, the minutes will be approved as read." Or, if corrections are needed, "The minutes are approved with corrections."

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

PRESIDENT: "If there is no objection, the chair will appoint a committee to approve the minutes of this meeting. Hearing none, the chair appoints _____, _____, and _____ who will meet and approve today's minutes." *The chair may appoint a committee to approve the current minutes especially if the next meeting is many months away.*

Treasurer's Report (Required)

The chair recognizes the Treasurer for the financial report which is required for all meetings. The Treasurer reads the report. Copies of the report may be distributed to the members or shown on a screen. The financial report includes at least the beginning balance, total income, total expenditures, and the ending balance, plus the reconciliation report and current Actual versus Budget Report. The chair takes questions and then the report is filed with the Secretary. All information is recorded in the minutes.

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

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

Approval of Proposed Budget (Required once per year)

The proposed budget for the new year is presented to the BOD for its consideration and edits. At the General Membership Meeting, the budget is presented for approval. PRESIDENT: “____, Treasurer and chair of the Budget Committee, will now present the proposed budget.” TREASURER: Each line item should be read. Ask for questions. After review, state “I move that the proposed budget be adopted as presented.” PRESIDENT: “The Budget Committee has moved to adopt the proposed budget as presented. This comes from the committee, so no second is needed. Is there any discussion? Hearing none, all those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.” The motion needs an affirmative majority vote.

Budget Amendments

When the Treasurer proposes any budget amendments after the annual budget was approved: PRESIDENT: “____ will now present the budget amendments.” TREASURER: Each amendment needs to be read, the current amount, the amount of the increase or decrease, and then the new amount, if applicable. After reading the items, state “I move that the budget amendments be approved as presented.” PRESIDENT: “_____ moved that the budget amendments be approved as presented. Is there a second? Is there any discussion? Hearing none, all those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.” The motion needs an affirmative majority vote.

Audit Report

The Audit Report is presented at the first meeting of the year and at the first meeting after any audit. PRESIDENT: “____, the chair of the Audit Committee, will now present the Audit Report.” CHAIR OF AUDIT COMMITTEE: The chair reads the Audit Report, and then says, “I move to adopt the Audit Report as presented.” PRESIDENT: “_____ has made a motion to adopt the Audit Report as presented. This comes from a committee so no second is needed. Is there any discussion? (pause) All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.” The motion needs an affirmative majority vote.

Letters or Communications

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

President and VP Reports

The President calls for reports from the officers. This may be informational or require action. Those reports requiring action are presented as a motion. The member presenting the report makes the motion. PRESIDENT: will give a report on ____.” OFFICER: *Reads the report and makes recommendation.* “I move that ____.” The President repeats the motion and asks for a second (if not committee work). The person making the motion may explain further. PRESIDENT: “Is there further discussion? Are you ready for a vote? ____ has moved that ____.” All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.”

BOD and Committee Reports at General Membership Meetings (Optional)

A summary report of the Board’s work is given at a General Membership Meeting and contains any motions made in the Board meetings. The Secretary reads a summary report (not the minutes) for the members. The Secretary moves the adoption of each recommendation individually. PRESIDENT: “____, Secretary, will give the Board’s Report.” SECRETARY: “The Board met on ____ with a quorum present.” For each motion say, “On behalf of the Board of Directors, I move that ____.” PRESIDENT: “The Board has moved that ____.” This comes from the committee so there is no second needed. _____, would you like to speak to your motion?” (*Person making the motion may speak to their motion.*) “Is there any further discussion? ____ has moved that ____.” All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.”

Standing Committee, Special Committee, and Special Orders Reports

The President calls for the reports of the committees, if needed. A report from a committee may be informational or require action, as determined by a majority vote of the committee. Those reports requiring action are presented as a motion to the membership (no second required), and the members vote to approve either as presented, amended, or rejected. The committee chair presenting the report moves the adoption of the motion. Motions that

made a “special order” (by a two-thirds vote at an earlier time) and matters required by the Bylaws to be taken up at a specific meeting are addressed. If no recommendation is made, no motion is needed. Use the above script.

Appointment of Nominating Committee (See the Bylaws for timing and notices.)

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

SECRETARY: The secretary reads directly from the Bylaws the Article on Nominations and Elections, and the sections regarding the Nominating Committee. PRESIDENT: “The floor is now open for nominations for the Nominating Committee who solicits the slate of officers.” The chair should call on anyone who has raised their hands until all nominations have been made. Individuals may nominate themselves. If a member nominates someone else, the chair should ask that person if they will accept the nomination. The Nominating Committee is appointed by an affirmative majority vote. PRESIDENT: “The Nominating Committee will be [3 people] with [2 people] being alternates (optional) to the committee.” *For an elections script and details on elections, see LAPTA Toolkit: Elections and Nominating Committee.*

Adjournment (Required)

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

SAMPLE PASSWORDS & ACCOUNTS SUMMARY

It is very important to keep a current list of passwords, to have at least two officers have a copy of it, and to graciously share it with the next Board.

ABC PTSA Passwords & Accounts 2023-2024

PTA LUR #: 9999

IRS EIN# 99-9999999

Monthly/Annual Renewal:

GeauxBiz.com: login email & password

LA Charter #: 999999 ; NAKS #: 999999

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

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

Moneyminder.com: email & password

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

SquareUp.com: email & password

Zoom: email & password

Mailchimp.com: email & password

Other Accounting Software: login & password

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

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

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

Email Accounts:

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

Closed Accounts' Previous Login Information:

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

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

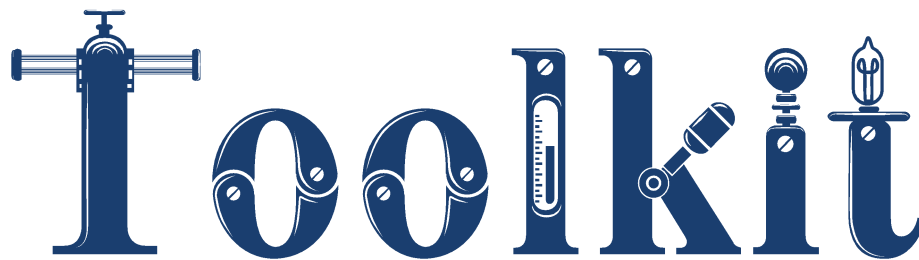
Members of the Board of Directors serve in a **fiduciary capacity** and owe a **duty of care**, a **duty of obedience**, and a **duty of loyalty** to the PTA. Board Members shall conduct themselves with **integrity** and **honesty** and act in the **best interests** of the PTA. Disclosure by a Board 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) nonprofit status, and for our protection, we, the undersigned officers, during our terms of office, shall:

1. Abide by and represent our PTA Bylaws, LAPTA policies, positions, procedures, and National PTA purposes and mission statement.
2. Discharge the duties and responsibilities of our individual offices with fidelity, integrity, and honesty and declare all personal and extended family conflicts of interest when PTA issues and funds are involved.
3. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than the authorized budgeted items.
4. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA.
5. Publicly present a united front on decisions made as a Board.
6. Maintain confidentiality as a 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.

2024–25 PTA Leader



Section 3: Treasurer

LouisianaPTA.org/treasurer



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INTRODUCTION

The Treasurer serves as the official custodian of the PTA's funds. The Treasurer is responsible for receiving and disbursing funds in accordance with the Bylaws, the approved budget, and as directed by the PTA's decisions. The President, who holds ultimate responsibility for the PTA's affairs, and BOD who bears fiduciary obligations to the PTA, should all possess a solid grasp of financial matters. The membership, through budget adoption, determines how PTA funds will be generated and utilized. Complying with the rules set by the Bylaws, the budget, and the IRS significantly reduces the risk of problems arising.

It is crucial to understand that the PTA's funds do not belong to the Treasurer. Even if the Treasurer disagrees with the membership's budget choices, adherence to the organization's will is essential. Furthermore, the financial records are the property of the PTA, not any individual officer. The Treasurer must hand over all records to their successor or an Audit Committee at the end of their term. Many PTAs handle substantial sums of money through the PTA account. To safeguard both the PTA and the Treasurer, it is imperative to manage funds in a way that ensures every dollar can be accounted for. Most of the PTA regulations and requirements actually come from the IRS. While some requirements seem meticulous, they are time well invested.

Familiarize yourself with LouisianaPTA.org/treasurer. It holds great importance. If you have any questions or concerns, contact the LAPTA Treasurer at treasurer@LouisianaPTA.org.

TREASURER’S BINDER

It is important to keep an organized and up-to-date binder with the following suggested sections:

- Accounts & passwords summary sheet including account numbers for debit cards; board roster
- Blank copies of Expense and Deposit Forms
- Completed Expense Forms with receipts
- Completed Deposit Forms
- Monthly bank statements and reconciliation reports
- Approved budget, Budget Approval Form, monthly budget reports, and any budget amendments
- Agendas and minutes from Executive Committee, Board of Directors, and General Membership Meetings
- Charter information such as IRS tax filings, Secretary of State Articles of Incorporation Annual Report, insurance policy, audit reports, Bylaws, Standing Rules, and LAPTA Toolkit
- Miscellaneous papers, including correspondence

RESPONSIBILITIES OF THE TREASURER



- Register as a PTA Leader at LouisianaPTA.org/register.
- Sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Study and know the PTA Bylaws, Standing Rules, and LAPTA Toolkit: Treasurer.
- Attend LAPTA training in August; if possible, attend National PTA training and conventions.
- Change signatures on all bank accounts. Use the school's mailing address for the account.
- Function as the custodian of the checkbook.
- Maintain the Treasurer's Binder with all required financial documents.
- Chair the Budget Committee.
- Present the proposed budget for approval at the first General Membership Meeting.
- Receive all money and deposit it in a timely manner. National PTA suggests one day.
- Make disbursements with a check or debit card as authorized by the PTA in accordance with the budget.
- Keep an accurate and detailed account of all money received and disbursed.
- File the annual IRS taxes or hire a professional. The fiscal year for most PTAs is July 1 through June 30 with taxes due 4 ½ months later which is November 15.
- Renew the annual Articles of Incorporation with the Louisiana Secretary of State at geauxbiz.com.
- Renew the annual insurance policy.
- Reconcile all accounts monthly.
- Transfer funds from all online accounts monthly, such as CheddarUp.
- Submit a budget report at all BOD and General Membership Meetings.
- Make an annual budget report to the PTA.
- Complete the Year-End Financial Review Checklist.
- Present to the Audit Committee all materials necessary for the review.
- Purchase PTA memberships monthly from LAPTA at LouisianaPTA.org/membership.
- Recruit new PTA leaders and PTA members.

MONEYMINDER AND CHEDDARUP

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

MoneyMinder.com is simple accounting software for volunteers and makes tracking expenses and deposits and running reports as simple as possible. It is also easily shareable from one Board to the next with easy access to past years. MoneyMinder has a feature that allows you to e-file Form 990-N and 990-EZ directly to the IRS. **A free accounting alternative is the Wave App at waveapps.com.**

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

PRINCIPLES OF PTA FINANCIAL MANAGEMENT

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

Each Local PTA Unit operates as an independent 501(c)(3) nonprofit organization that collaborates closely with its affiliated school. PTA funds are legally classified as private funds, contributed to or raised by the membership, and intended exclusively for the PTA's use. In contrast, school accounts are composed of public funds derived from taxes and allocated to schools through legislative or governmental channels. Consequently, schools are held accountable to the public for the allocation of these funds. PTA-raised funds are the sole property of the membership and are not subject to external reporting requirements, unlike public funds. PTAs are not obligated to furnish financial reports to school administrators or the school board. Therefore, it is imperative that all PTAs maintain distinct and independently controlled accounts, directly overseen by the PTA and its Board of Directors (BOD). School officials possess no authority over PTA funds, except in instances where the PTA collaborates with the principal to identify school needs and the PTA's role in addressing those needs.

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

The initial proposed budget requires approval during the first General Membership Meeting of the year. Prior to this approval, PTAs are limited to the amount designated in the "Startup Funds" category from the preceding year's budget. **It is mandatory for every budget to include a "Startup Funds" category** to facilitate pre-approval expenditures. See the sample budget for details. Any supplementary proposed expenses or fundraising initiatives not incorporated within the approved budget must be presented to the PTA as a budget amendment for approval before initiating the project or making payments. This required an affirmative two-thirds vote.

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

Local Units are obligated to submit member dues to LAPTA at a rate of \$3.50 per member per year. LAPTA forwards \$2.25 per member to National PTA and retains \$1.25 for LAPTA. These funds sent to LAPTA should not be included in the gross income calculation for IRS tax filings. Instead, only report the "net" income derived from member dues on the tax report. The budget should still indicate both the gross and net income from dues.

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

A check can be written in advance with everything filled in except the amount if it's not known. Never write a check to cash. The check should be made payable to the person or business for the fund.

Always have two people sign every expenditure.

The Bylaws require two signatures to authorize every purchase. Individuals authorized to sign checks may not be related to each other by marriage or any other relationship nor should they be a part of the same household. Debit cards may be issued to authorized signers on the bank account if every purchase is properly documented with receipts and two signatures on the Expense Form, although Caddo Parish does not allow debit cards.

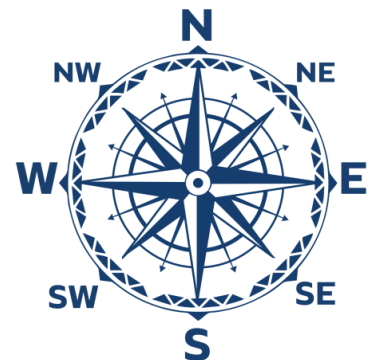
Do not allow another organization (including the school) to pass its money through PTA accounts.

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

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

Bond all officers and chairs who oversee money to protect the PTA's assets by purchasing annual insurance. This is required by LAPTA.

Always have cash deposits counted and signed by two people. Always issue a receipt for cash received.



RAISING MONEY

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

There are many different methods to raise funds. PTA leaders need to evaluate opportunities carefully and consider all legal and community-related implications. When using a fundraising company, protect the PTA by having all information in writing. Make sure the contract is between the two organizations and not *individuals*. Contracts are only signed by the President or Treasurer with BOD approval, and the signer adds their title after their name to show they are signing for the PTA. When reviewing the contract, look for cost and profit percentages, list of approved promotional materials, desired services, dates for delivery and payment, and procedure for handling damaged, unsold, or returned merchandise.

BUDGET

The budget serves as a financial roadmap, outlining projected income and expenses aligned with the PTA's objectives. For it to be effective, the budget must realistically anticipate annual expenses and strategize how to secure the required funds to meet those financial commitments. The budget covers a 12-month period. Most units typically follow a fiscal year schedule from July 1 to June 30, as specified in the Bylaws.

It is crucial to emphasize that fundraising is not the primary mission of PTA. Instead, the primary mission is to **make every child's potential a reality by engaging and empowering families and communities to advocate for all children**. Fundraising efforts are aimed at supporting essential programs and services that enhance student learning and family engagement. It is essential for units to raise only the necessary funds to cover their expenses, without letting fundraising activities dominate to the extent that other projects are neglected, diverting members' attention away from the PTA's core objectives.

Erring on the side of caution, it is advisable to overestimate income rather than underestimate it in budgeting. **Every budget must include a "Startup Funds" line item**, allowing for purchases to be made before the General Membership formally approves the new budget. Once the budget is approved, the Budget Approval Form must be completed and submitted to LAPTA as part of the Active Affiliation Report.

The Budget Committee

The Treasurer is the chair of the Budget Committee which is composed of three members and as specified in the Bylaws. Other members might include the past and current President, past Treasurer, and the principal. To develop the budget, the committee should review the previous year's budget and the Treasurer's reports to make recommended changes. Gather information from the BOD about their planned activities and financial needs. Consider sources of funds to meet these requirements. If a unit has identified programs or projects to conduct, it might want to budget expenses first. Knowing the expense figures helps determine how much revenue is needed. Or a unit can budget revenue first and then determine its programs and projects.

Creating a Budget

Traditionally, total income must equal total expenses with zero as the net total even though all of the money does not need to be spent every year. There should be a line item for every major category or event. It should be simple but detailed to permit all income and expenses to be correctly categorized. The following template works well with MoneyMinder.com and is only a suggestion. *See sample budget later in this section.*

- Create a main **Fundraising** section and list each event's gross income and the expenses resulting in the net income such as a Fun Run, Gumbo Cook-Off, grants, general donations, and spirit wear sales.
- Create a **Student and Parent Programs** section and its items such as PBIS support, mental health speaker, honor roll events, Santa & Hot Cocoa Night, Grandparents Bingo, newsletter, and STEM Night.
- Create a **Teacher, School, & Community** section and list its items such as Staff Welcome Lunch, Staff Snack Days, Staff Appreciation Week, Playground Equipment, Community Outreach, and more. Hospitality should not exceed 5% of the budget and only includes small *Welcome Committee* type expenses. Teacher lunches and events are

itemized so that each event has its own line item.

- Create an **Administration** section for items such as PTA membership dues, insurance and bonding, Articles of Incorporation renewal, Zoom, CheddarUp.com, MoneyMinder.com, website, leadership training with LAPTA and National PTA, bank fees, copies, required **Start Up Funds**, Carry Forward & Ending Balances, a small Miscellaneous line item (<\$1000), and more. Start Up Funds are the only amount that may be used prior to budget approval. Once the budget is approved by the General Membership, these early expenses should be applied to the appropriate line item in the budget. The **Ending Balance** is used for the projected closing balance although there are alternatives to this. See LouisianaPTA.org/treasurer for further explanation.

Scholarship & Mission Fund

PTAs may opt to establish a Scholarship and Mission Fund. The paramount considerations when granting scholarships to students, educators, or other PTA entities are impartiality and equitable access. It is imperative that clear, written procedures govern the formation of the committee and the selection of recipients. Committee members' relatives may not apply for funds. The funding source for these scholarships comes from a Mission Fund to which the PTA actively seeks contributions. The accumulation of adequate resources might take several years which is permissible if the PTA maintains a well-documented plan. Donors must be informed of the plan's current status. It is not necessary to issue a 1099-MISC for scholarship recipients. The PTA is required to inform recipients that if any portion of the funds is not used for educational expenses, it is considered taxable income by the IRS.

Obligating Future Boards

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

Noncommercial Policy

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

Amending the Budget

Because the budget is only an estimate of the planned expenditures and income for the year, amendments might be necessary. Amendments can be made at any General Membership Meeting or Special General Membership Meeting called for that purpose with proper notice. An affirmative two-thirds vote is needed.

BANKING & E-COMMERCE POLICY

Local PTA Units have the option to utilize electronic commerce for the receipt and disbursement of funds. There are several online platforms available, such as CheddarUp.com, SquareUp.com, and MoneyMinder.com. If a PTA uses MoneyMinder Pro (\$179/year), they can access the CheddarUp Team Edition for free.

An **Employer Identification Number (EIN)**, also referred to as a Federal Tax Identification Number (TIN), is a nine-digit identifier issued to business entities by the Internal Revenue Service (IRS). A PTA's EIN designates it as a nonprofit organization. This unique number is essential for all bank accounts and tax filings. It is crucial never to use an individual's Social Security Number for opening a bank account. Some online payment processors and the EIN application itself require the use of a personal Social Security Number.

Checking Account: Each PTA unit is required to maintain its dedicated bank account. When establishing an account, banks need the Employer Identification Number (EIN), Articles of Incorporation, and minutes documenting the Board's election and the appointment of signatories, among other potential documents. Local PTA units may not utilize the EIN of a school or school district.

Authorized Signatures: For all bank accounts, a minimum of three individuals must serve as signatories for the checking account. The Treasurer must be included as an authorized signer on these forms to endorse checks and make withdrawals. Only currently elected PTA officers possess the authority to sign checks. All PTA expenditures and check disbursements require two authorized signatures. Signatories are not permitted to endorse checks

payable to themselves. A school employee can gain signing authority on a PTA account only if they hold an elected officer position within the PTA which may only be as a VP or Secretary.

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

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

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

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

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

Deposits: The Treasurer receives all funds for the PTA and promptly deposits them into the PTA's account. National PTA recommends depositing funds within one day. Only PTA funds may be deposited into the PTA account. A signed Deposit Form must accompany each deposit with two signatures required for cash deposits. A sample Deposit Form is included in this section.

Two people must count all deposits. The chair turning over the money keeps a copy of the Deposit Form and may request a receipt from the Treasurer for their records. The Treasurer should not keep cash in their car or home. Plan for a night deposit for late collections or use the school's safe with a completed Deposit Form. After making a deposit, the Treasurer should attach a copy of the deposit slip, if possible.

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

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

Donors And Charitable Contributions: PTAs must be prepared to issue receipts for contributions made, regardless of the amount or value. Canceled checks are not sufficient. There is no required format for the receipt and Social Security Numbers are not required. The receipt must reflect at least the donor's name, date, cash amount or

description of the property received, a statement that no goods or services were provided by the organization in return for the contribution, and the PTA's name. If a donor receives the value of goods or services for the donation, only the portion in excess of the value is deemed a donation. A description and good faith estimate of the value of goods or services provided (if any) in return for the contribution must be included in the written acknowledgment. A donor cannot claim a deduction of \$250 or more unless the donor obtains a written acknowledgment of the contribution. A sample General Donation Form is at the end of this section.

PTAs are required by IRS disclosure rules to inform prospective donors about the extent to which their contributions are legally tax-deductible. If a PTA holds a fundraising event that provides a meal or some tangible item in return for the purchase of a ticket, then the portion of the ticket that is tax-deductible is the ticket price less the fair market value of the meal or item received. For example, if a spaghetti supper ticket sells for \$20 and the value of the meal is determined to be \$5, the purchaser is entitled to a \$15 charitable contribution deduction. The \$5 is the value of a prepared and served meal allowing for a reasonable profit.

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

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

PTA Membership Dues: Local Units must submit dues of \$3.50/member to LAPTA, which includes the National PTA and LAPTA dues portions. According to the IRS, the National PTA and LAPTA dues portions never belong to a Local Unit. They should not be included in the budget as money to be spent for budget planning purposes. They are also not included in the gross income when reporting income to the IRS. The \$3.50 includes \$2.25 which LAPTA forwards to National PTA and \$1.25 which LAPTA retains. Dues are submitted to LAPTA through CheddarUp.com. E-checks are the preferred payment method. The link to submit dues is listed at LouisianaPTA.org/submitdues. LAPTA does not provide paper membership cards. The template for membership cards is available at LouisianaPTA.org/membership. PTA memberships are sold to individuals. If a PTA wishes to sell family memberships, it must collect enough to cover the state and national portions of \$3.50 *per person* in the family. For this reason, family memberships are discouraged.

Bank Statements & Reconciliation: The PTA's permanent mailing address for bank accounts is the school's address. All bank statements must be signed by a person who is not authorized on the account. Reconcile the bank account monthly and compare with the register balance to ensure that bank and financial records are correct. Present the reconciliation report at PTA meetings for review and file the report in the Treasurer and Secretary Binders.

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

INSURANCE (REQUIRED)

Operating a PTA unit is much like running a small business. Businesses have insurance to protect their people and investments. LAPTA requires PTAs to obtain adequate insurance protection against liability and monetary loss due to fraud, embezzlement, or dishonest acts. Purchase annual insurance coverage from any insurance company that offers coverage to PTAs and other nonprofits at a reasonable price. LAPTA uses AIM (Association Insurance

Management). LAPTA does not have a minimum amount of required coverage. Ask about adding social media or online protection coverage. Be aware of potential liability for things such as a donation to the school to cover field trips. While offering financial assistance to the school can reduce liability, it does not guarantee that the PTA will not be held responsible in certain situations. The insurance company can recommend adequate coverage.

ARTICLES OF INCORPORATION

Louisiana law requires that all nonprofits register annually with the Louisiana Secretary of State at geauxbiz.com. The PTA must update officer data, file the Annual Report, and pay a \$10 renewal fee plus \$5 credit card fee if you do not use an e-check. The Articles of Incorporation must be kept permanently on file and are part of the annual Active Affiliation Report for LAPTA. If you do not have the previous login, create a new login and note it on your Password Summary file. The **NAICS number is 813410**.

FEDERAL TAXES

IRS Section 501(c)(3): The Louisiana PTA and all subordinate units in Active Affiliation are exempt from federal income tax as charitable and educational organizations under the provisions of section 501(c)(3) of the IRS Code. They fall under LAPTA's 501(c)(3) tax umbrella exemption. Annually, LAPTA is required to submit to the IRS a list of all units in Active Affiliation. Those listed are covered by the LAPTA group exemption. For units failing to submit their Active Affiliation report in time, LAPTA may choose to remove them from the tax umbrella. **Any unit not listed would be subject to income tax on all earnings.**

Protecting Tax Exemption: As 501(c)(3) organizations, the LAPTA and its Local Units in Active Affiliation may solicit and spend funds without paying income tax to the federal or state governments if they comply with rules governing nonprofit organizations. *(Note that PTAs pay sales taxes when they buy things.)* All income must be directly related to the purposes of the organization. To maintain its 501(c)(3) status, a PTA must meet specific standards. The organization must be **noncommercial, nonsectarian, and nonpartisan**. This means it does not engage in specific commercial endorsements, is not involved with specific religious groups, and does not endorse or support political candidates or parties. Further, neither the organization's name nor any member acting in an official capacity can endorse or promote a commercial concern or political party or conduct activities not in keeping with the PTA purposes and mission.

Donations & Deductions: The 501(c)(3) designation means that all contributions to PTAs are deductible for the donor as charitable contributions for federal income tax purposes. If a donor requests verification that a PTA is a 501(c)(3) charitable organization, use the Validation Letter from LAPTA. This is issued annually once a PTA acquires Active Affiliation. PTAs must be prepared to issue receipts to donors whose contributions exceed \$250/day. Cancelled checks are no longer sufficient. There is no required format for the receipt, but it must include the PTA's name, donor's name, date, and cash amount received or a description of the property received.

PTAs must inform prospective donors about the extent to which their contributions are tax deductible. This disclosure should indicate the fair market value of any tangible benefit received in exchange for a contribution and the amount of the donation that is deductible as a charitable contribution. PTA volunteers may deduct out of pocket expenses while volunteering for the PTA. These include mileage for travel to and from volunteer sites, costs not reimbursed relating to volunteer work such as phone calls, and the costs of childcare incurred to enable a person to volunteer. The value of a person's time is not deductible.

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

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

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

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

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

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

Form 990-N must be completed and filed electronically. There is no paper form. Use the Form 990-N Electronic Filing System User guide to avoid most problems. Organizations should continue efforts to file, even if late. Form 990-N is easy to complete with only 8 items of basic information: the EIN, tax year, legal name, mailing address, any other names the organization uses, name and address of a principal officer, website address if one exists, confirmation that the organization's annual gross receipts are \$50,000 or less, and, if applicable, a statement that the organization has terminated. Form 990-EZ and Form 990 are more complex.

A PTA is required to file Form 1099-MISC if it paid \$600 or more during a calendar year to a business or person for services rendered. Examples include a guest speaker or artist-in-residence. A copy must be sent to the recipient by February 2 of the year following the payment and a copy must be sent to the IRS by March 1. Form 1099 is not required for scholarship recipients regardless of the amount paid.

STATE SALES TAX

PTAs are required to pay state and local sales tax on every purchase. Many PTAs wrongly assume that since public schools are exempt from paying sales taxes and have a sales tax exemption number from the state, PTAs are also exempt. If a PTA member is asked for a tax number, he is required to inform the salesperson that PTAs are not exempt from sales taxes. Do not use a school's sales tax exemption number to make purchases because this is fraud.

They are also to collect and remit sales tax on items sold unless an exemption has been granted by the state. Units can apply for a **sales tax exemption** for fundraisers by filing Form R-1048 at www.rev.state.la.us and submitting it to the Louisiana Department of Revenue no later than two weeks prior to the event. The types of fundraisers that are generally granted an exemption include fairs, festivals, and admission tickets to dances or performances. Fundraisers that involve an outside promoter or vendor who profits from the event will be denied an exemption. Additionally, fundraisers involving the sale of products that would be in direct competition with local retailers, such as school supplies, wrapping paper, or candy, are not eligible for an exemption. Check with the parish tax collection office to determine the requirements for remitting local taxes. If a PTA was denied an exemption or chose not to file for an exemption, it must apply for a Louisiana Tax Number with the Department of Revenue at rev.state.la.us. Include that the PTA will have "irregular sales." Sales taxes are due by the 20th day of the month following the sale.

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

GIFTS TO SCHOOLS

Each PTA wants to ensure that its supported school can purchase items that will improve the quality of education. PTAs can only give money to schools if it is for a designated and specified purpose. When a unit decides to have the school make a purchase, the General Membership must first approve the specific gift to be made (not just a cash amount). The donation must specify the designated purpose agreed to in writing between the PTA and the school official. The agreement states the nature of the item purchased, the way it is to be used, and when it will be procured. It should also include that the school will furnish a copy of the invoice to the PTA, and that all funds will be returned to the PTA if the item is not purchased or the terms are not met. See sample Donation Forms at the end of this section. A PTA can directly purchase items for a school with a PTA check and then donate them. In this situation, the PTA receives the receipt directly.

3 TYPES OF FINANCIAL REPORTS

Robert's Rules of Order, Revised Edition specifies that the Treasurer is responsible for making regular Budget Comparison and Activity Reports for all Executive Committee, Board of Directors, and General Membership Meetings. Copies of the reports are distributed to the members in attendance when possible. For a General Membership Meeting, it may be posted on a bulletin board, digitally displayed, or on paper copies. They do not need a motion to be accepted. The Secretary keeps a copy with the minutes.

1. **The Activity Report** includes the date, the current balance, total of expenses and income, and the previous balance from the last report. Depending on the size and composition of the membership, the Treasurer might need to provide more information.
2. **The Budget Comparison Report** compares the budget amounts with the actual amounts and the net amount for each line item. This shows how much the PTA is under or over in each category. This format indicates if there is a problem in any category.
3. **The Annual Report** is prepared at the close of the fiscal year. The Treasurer makes a preliminary report to the membership at the annual meeting. This report is for information only and is not officially adopted. It is filed with the permanent financial records.

AUDIT COMMITTEE & ITS REPORT

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

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

Who? Bylaws require an Audit Committee of at least three appointed members to conduct the review. Only members who are not signatories may serve on the committee.

When? An audit is done once a year even if the same Treasurer remains in office. It may also be requested anytime one is deemed necessary or whenever the authorized signers on the bank account change. The Audit Report is due at the end of October to LAPTA with the Active Affiliation report.

How? The Treasurer turns over all necessary documentation to the Audit Committee. The current and previous Treasurers should be available for questions. The Treasurer supplies the Audit Committee with the last audit report, checkbook, bank statements, Expense and Deposit Forms, financial and annual reports, any minutes that contain budget adoptions or amendments, and any other information requested.

Procedure: The Audit Report at the end of this section contains instructions and a worksheet. Begin with the records after the last audit, which is usually July 1. Check to see if the amount shown on the bank statement corresponds to the starting balance recorded in the checkbook and ledger. Verify that bank reconciliations were

done monthly. Reconcile each month's bank statement. Make sure that every check written is substantiated with an Expense Form and receipt. Verify that all purchases have two signatures. Check to see that checks are not signed by the individual to whom they are made payable. Verify that all income and expenditures are allocated into the approved budget. Make certain that state and national portions of the membership dues were paid to LAPTA. Reconcile each deposit slip with bank statement and checkbook entries. Check the math for the totals. Check each month's ledger entries for error, and crosscheck against checks issued and receipts posted. Check the Treasurer's reports for accuracy. Verify that the reports are true representations of the transactions recorded.

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

The Audit Report Form, instructions, and a worksheet are found later in this section.

RECORD KEEPING & RETENTION

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

Regular financial reports are required. The actual versus budget comparison reports must be produced for every Executive Committee, Board of Directors, and General Membership Meeting. Each report generated must show the title and date. MoneyMinder has an edit box to add a title and date. Make copies of the files on a regular basis, preferably any time that the records are modified and at least monthly. Store a set of backup records away from the Treasurer's computer system such as another officer's home or the school. The ledger must maintain the running balance in the account. Follow these record retention guidelines:

Permanent Storage

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

10 Year Storage

- Personnel Records
- Employee Contracts
- Personal Property Leases

7 Year Storage

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

3 Year Storage

- Correspondence and internal memoranda
- Bank reconciliation reports

1 Year Storage

- Routine emails

ADDITIONAL RESOURCES

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

The Internal Revenue Service website is IRS.gov. The "charities and nonprofits" section is especially helpful to PTAs and allows downloading of forms and instructions as well as informational brochures. One of the most useful is Publication 4221: "Compliance Guide for 501(c)(3) Tax-Exempt Organizations."

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.

TREASURER'S OVERVIEW

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

- Transition meeting held with outgoing Treasurer. Date: _____
- Bank's signature cards updated. Date: _____
- Budget Committee formed. Date: _____
- Proposed budget presented to Board for consideration.
- Proposed budget presented to General Membership & approved. Date: _____
- Budget Approval Form completed.
- Budget amendments were approved by General Membership on all of the following dates: _____

- Gather documentation for the Active Affiliation Report. Date Submitted to LAPTA: _____
- The bookkeeping method is _____.
Any login passwords and accounts are _____.
- Expense and Deposit Forms copied and distributed to the Board of Directors.
- Treasurer and President developed a reimbursement system. Only budgeted expenses are reimbursed and only with receipts/invoices attached.
- Routinely enter and file Expense and Deposit Forms into accounting software or ledger.
- The monthly bank statement is reviewed and signed by someone who is not an authorized signer on the bank account. Treasurer and President review bank statements and financial status monthly.
- Activity and Budget Comparison Reports given at all meetings.
- Books closed and Annual Report prepared. Date: _____
- Audit Committee chosen. The names are: _____
- Audit Report completed. Date: _____
- Audit Report and Annual Report shared with the General Membership. Date: _____

YEAR-END FINANCIAL CHECKLIST

- Passwords & Accounts: Have all accounts and current passwords typed in the front of the binder.
- Expenses: All expenses must have receipts and Expense Forms signed by two authorized people.
- Deposits: All Deposit Forms with cash require two signatures. Transfer money from any online accounts.
- Bank Statements: Every statement needs to be signed by someone who is *not* a check signer.
- Reconciliation: Reconcile bank accounts through the end of your term.
- Budget & Agendas: Have all budgets, agendas, and minutes.
- Prepare Annual Report.
- Charter Info: Include tax filing, insurance policy, Secretary of State (geauxbiz.com) registry, Audit Report.
- Bank Signers: Update signers at the bank. Most terms end on June 30.
- Checks & Debit Cards: Have the checks, ledger or register, and any debit cards together.
- Meeting: Meet with the incoming Treasurer and President to turn over all financial records.
- Audit Report: Assist as needed with the Audit Committee.

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



BUDGET APPROVAL FORM

Deadline: October 31, 2024

This form is required to maintain a Local PTA Unit's Active Affiliation with LAPTA and National PTA. It should be submitted annually by **October 31, 2024**. See LouisianaPTA.org/affiliation for other required items.

| | | |
|---------------------|--------|-----------------|
| Local PTA Unit Name | Parish | Local Unit LUR# |
|---------------------|--------|-----------------|

School Name

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

Attached is the Approved Budget.

President's Signature

Treasurer's Signature

President's Name

Treasurer's Name



SAMPLE BUDGET XYZ PTSA

July 1, 2029 – June 30, 2030

*Starting Balance: \$0

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

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

SAMPLE COMPARISON BUDGET REPORT

May 22, 2023

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

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

EXPENSE FORM

_____ \$ _____
 Date Total Amount

Requested by: _____

Choose One:

- Debit Card Purchase (Do not reimburse)
 OR
 Check Payable to: _____

Attach all receipts to the **back** on **this side** of the page. If the receipt was lost or one was not acquired, attach a complete explanation.

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

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

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

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

Grand Total for Expense: _____

Deliver check to: _____

Mail Check to: _____

Certification: The expenses listed are authorized PTA expenses.

 Signature Date

 Signature Date

FOR TREASURER'S USE ONLY

| | | |
|--|----------------|--------|
| _____ | _____ \$ _____ | _____ |
| Date Disbursed | Check # | Amount |
| Note <input type="checkbox"/> Receipts Attached <input type="checkbox"/> Entered in Accounting Software/Ledger | | |

AUDIT REPORT

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

Local Unit Name _____ Parish _____

LUR# _____ IRS EIN _____ Fiscal Year _____

Dates covered by this audit: First date _____ to last date _____.

Check number range reviewed by this audit are _____ to _____.

Ledger or Accounting Software Reconciliation

1. _____ Beginning balance on Date: _____ (day 1 of audit year)
2. _____ Sum of all deposits for audit year
3. _____ TOTAL (Add lines 1 & 2)
4. _____ Sum of all expenses with receipts for audit year
5. _____ Ending balance on hand on last day of audit year (Line 3 minus Line 4)

Bank Statements Reconciliation

6. _____ Bank Statement Balance on Date: _____ (day 1 of audit year)
7. _____ All credits on bank statements for audit year
8. _____ All deposits not yet credited (_____)
9. _____ TOTAL (Add lines 6, 7, & 8)
10. _____ All withdrawals on bank statements for audit year
11. _____ All uncleared checks not on bank statements (_____)
12. _____ Ending balance on last day of audit year (Line 9 minus Lines 10 & 11)

Line 5 must equal Line 12.

The Audit Committee examined the financial records on _____ date and find them:

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

If there are discrepancies or missing paperwork, work with the previous Board to resolve any issues. For further assistance, contact LAPTA at Treasurer@LouisianaPTA.org.

Auditors' names, emails, phones, and signatures:

1. _____

2. _____

3. _____

AUDIT INSTRUCTIONS

Audit Committee Details from the Bylaws: An Audit Committee of three members is appointed by a majority vote of the General Membership or by a two-thirds vote of the BOD to examine the books at the end of the fiscal year or after the resignation of a check signatory. The report is presented to the General Membership and a copy provided to LAPTA. See LouisianaPTA.org/treasurer.

Supplies: For the audit, the committee members, as determined by the Bylaws, need the checkbook, all Expense Forms and Deposit Forms, all bank statements for the fiscal year, and a copy of the previous year's audit. Each committee member oversees one part of the financials to review: one reviews the bank statements for the fiscal year, one reviews the checkbook or accounting software file for the fiscal year, and one reviews all expenses and Expense Forms for the fiscal year. The Treasurer may not participate in audit except to answer questions.

Instructions

- 1) Start with previous year's audit to verify that beginning of year balance equals the previous year's ending balance. Check this against the checking account balance from that time.
- 2) Next, verify each check written and each deposit made against the checkbook and bank statement for each month. Verify the signed Expense Forms and receipt for all checks written and deposits made.
- 3) Keep a list of outstanding checks and deposits and check them off as you go through each month.
- 4) At the end of the fiscal year, record all outstanding deposits (line 8) and uncleared checks (line 11).
- 5) Write the ending balance, which should be the same amount listed on the Audit Report line 5.
- 6) Complete the Audit Report by inserting the appropriate figures in each blank.
- 7) All committee members must sign the form stating that the PTA books were complete or incomplete.
- 8) If incorrect, first ask those involved to correct mistakes and then seek advice from the LAPTA Treasurer.

Directions by Line Number

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

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

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

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

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

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

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

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

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

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

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

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

Line 5 and line 12 should be the same amount.

If there are discrepancies or missing paperwork, work with the previous Board Members to resolve any issues. If a receipt is missing, a letter explaining the situation by the people involved may be submitted. After attempting to resolve any disputes, contact LAPTA Treasurer at treasurer@LouisianaPTA.org.

AUDIT WORKSHEET



Complete as needed to assist with the audit.

DEPOSITS

Deposits from _____ to _____ \$ _____
Day 1 Last Day Sum of deposits

(Line 7 of Audit Report)

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

| | | | |
|-------------|--------------|-------------|--------------|
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |

Deposits Not Cleared: (Line 8 of Audit Report)

| | | | | | |
|-------------|---------------|-------------|---------------|-------------|---------------|
| Date: _____ | Amount: _____ | Date: _____ | Amount: _____ | Date: _____ | Amount: _____ |
| Date: _____ | Amount: _____ | Date: _____ | Amount: _____ | Date: _____ | Amount: _____ |
| Date: _____ | Amount: _____ | Date: _____ | Amount: _____ | Date: _____ | Amount: _____ |
| Date: _____ | Amount: _____ | Date: _____ | Amount: _____ | Date: _____ | Amount: _____ |

EXPENSES

Disbursements from _____ to _____ \$ _____
Day 1 Last Day Sum of withdrawals

(Line 10 of Audit Report)

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

| | | | |
|-------------|--------------|-------------|--------------|
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |
| Month _____ | Amount _____ | Month _____ | Amount _____ |

Checks Not Cleared: (Line 11 of Audit report)

| | | | | | |
|-------------|---------------|-------------|---------------|-------------|---------------|
| Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ |
| Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ |
| Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ |
| Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ | Ch #: _____ | Amount: _____ |

SAMPLE NSF LETTER (Non-Sufficient Funds)

Current Date

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

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

Dear Check Writer,

On October 12, 2054, the ABC PTA was informed that the check issued for the Fall Festival tickets, amounting to \$55.00, was returned due to insufficient funds in the associated account. Over the preceding thirty days, we have made concerted efforts to communicate with you and liaise with the bank in our endeavor to recover the outstanding amount for the tickets. Please find a comprehensive record of these interactions and steps taken provided below.

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

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

Please remit the cash to the school by Friday, November 17, 2054, at 2:30 pm.

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

Sincerely,

Treasurer Name,
ABC PTA Treasurer

President Name,
ABC PTA President

(Copies should be sent to the principal and President.)

2024–25 PTA Leader



Section 4: Secretary

LouisianaPTA.org/secretary



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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 THE SECRETARY

The role of Secretary holds paramount importance within a Local PTA Board, constituting one of just two legally mandated positions in the state of Louisiana, the other being the President. The Secretary bears the crucial responsibility of meticulously documenting the proceedings of the PTA, maintaining comprehensive records for both members and leaders, and disseminating communications on behalf of the Board. These records, diligently kept by the Secretary, serve as the historical archive of the PTA.

Never underestimate the significance of the role of Secretary with phrases like "I'm just the Secretary." A proficient Secretary is characterized by qualities such as promptness, accuracy, and reliability, alongside a deep understanding of the PTA's objectives, Bylaws, Standing Rules, policies, and methodologies. This guide outlines the duties and responsibilities expected of an effective Secretary.

SECRETARY'S BINDER

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

1. Summary of PTA accounts and passwords and the Board roster.
2. Agendas, Minutes, meeting rosters, committee reports from meetings. This can be divided by month.
3. Charter Info (IRS taxes, Bylaws, Standing Rules, Secretary of State Annual Report, insurance policy, audit reports).
4. Membership: spreadsheets, reports, notes, email campaigns, Welcome Packet, etc.
5. Correspondence
6. LAPTA Toolkit: Secretary, plus other relevant sections.
7. Other

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.



RESPONSIBILITIES OF THE SECRETARY

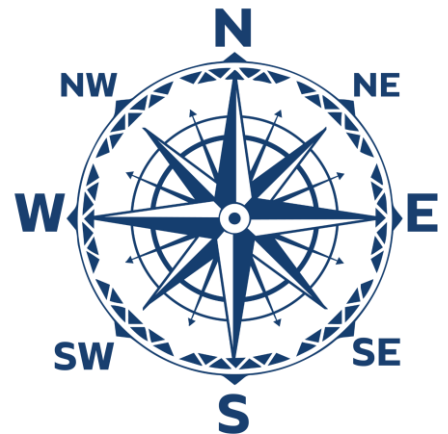
- Register annually as a PTA Leader at LouisianaPTA.org/register.
- Work with the outgoing Secretary to review the responsibilities and the PTA's practices.
- Provide guidance to incoming Board Members on best practices for the PTA.
- Ensure all Board Members signed the LAPTA Confidentiality, Ethics,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

DIVIDING RESPONSIBILITIES

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

The Corresponding Secretary

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



Recording Secretary

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

- Maintains and retains the roster record for meetings.
- Assists the President in determining if a quorum is present.
- Calls the meeting to order in the absence of the President and Vice-President, unless the Bylaws state otherwise, and presides until election of a *chair pro tem*.
- Accurately records all business transacted at each meeting of the PTA, which includes General Membership, Board of Directors, and Executive Committee meetings.
- Distributes the appropriate minutes for each meeting type. Board of Directors meeting minutes are read and distributed only at Board meetings. General Membership Meeting minutes are read and distributed only at General Membership Meetings.
- Stands and reads the minutes at all meetings.
- Acts as custodian of all records except those specifically assigned to others.
- Makes minutes and records available upon the request of a member. The records of the Secretary are open for the inspection of any member. However, records must not be released from the custody of the Secretary except upon written order of the President.
- Attends all training offered.
- Performs other delegated duties as assigned such as those of a corresponding Secretary.
- Counts a rising vote when requested by the presiding officer.
- The Recording Secretary should have the following available at all meetings: minute book (bound journal with numbered pages), agenda, approved Bylaws and Standing Rules, PTA calendar, minutes of previous meetings, Board roster, membership list, blank paper for ballots, Motion Forms, and a copy of Robert's Rules of Order, Newly Revised.

HISTORIAN

The role of a historian within the PTA is an optional position. In the absence of a designated historian, these responsibilities fall under the purview of the Secretary. Some PTAs maintain a tradition of creating a historical record, such as a history book or scrapbook, which encompasses all activities sponsored by the PTA and includes the Historian Report. This archival book should be stored conveniently, such as in the school library or office. In instances where this tradition is upheld, the historian typically holds a distinct role rather than it being part of the Secretary's responsibilities.

The historian maintains a comprehensive record of the PTA's endeavors and accomplishments. This repository of historical information is readily accessible upon request by the members. The formal written report by the historian serves as the official historical account. It is presented and ratified at the annual membership meeting and subsequently archived with the meeting minutes. This report encapsulates a summary of all the PTA's undertakings during the fiscal year. The Historian Report encompasses the following key components:

- A roster of the Board Members, including details of their election or appointment dates.
- Comprehensive documentation of all Board meetings and membership gatherings, along with highlights of significant matters discussed and presented to the membership.
- An overview of the PTA's events and activities held throughout the year, featuring concise descriptions of each training session, event, or activity attended by Board Members.



MINUTES

The official record of all meetings, known as the minutes, serves as the enduring repository of the PTA's proceedings. Given their potential use as legal documents during litigation, it is of paramount importance that they are meticulously and objectively documented, then conscientiously transcribed into a final form. Although the Secretary bears the primary responsibility for recording, preparing, and preserving the minutes, it is incumbent upon every member to review them diligently. It is worth emphasizing that if an event or action is not documented in the minutes, it is as if it never occurred.

Minutes should not be mistaken for a mere report; they are, in fact, a comprehensive record of the PTA's business. Their role is to safeguard the PTA and its members by chronicling actions taken rather than delving into verbal exchanges or personal opinions. In the minutes, you will find an exhaustive account of all group actions, including the precise wording of motions, the names of their proposers, and the outcomes of these motions. The composition of the minutes should strike a balance between completeness, conciseness, and accuracy, aiming for brevity while ensuring the inclusion of essential and precise details.

These minutes should be handwritten in black or blue ink, then endorsed by the Secretary within a bound journal featuring numbered pages to prevent any potential tampering or removal of pages. The Secretary may also utilize a computer and type the minutes during the meeting rather than hand write them into a journal. Each entry in the minutes should specify the date, location, time, meeting type, and the names of the presiding officer and Secretary, or their alternates if applicable. During the meeting, the Secretary should adhere to the agenda's format and organization, taking notes exclusively on factual information and motions, with personal opinions and discussions omitted. At the meeting's conclusion, the Secretary's signature finalizes the minutes.

When tasked with recording the minutes of a meeting, make sure to have extra pens, a bound journal designated for minutes or a computer, and blank Motion Forms (located at the end of this section) at your disposal. Arrive at the meeting venue ahead of time to ensure that all necessary materials are prepared. Also, have a copy of the meeting agenda, the sign-in sheet for attendees, any relevant reports, financial statements, and documents that may be referenced during the meeting. In the event that the Secretary is absent, a secretary pro tem may be appointed for that meeting.

The most challenging aspect of minute-taking involves determining what information should be transcribed verbatim, what can be paraphrased, and what is not essential for the official record. Minutes should be succinct, factual, and impartial accounts of the meeting proceedings. Therefore, it is important to avoid letting personal preferences influence notetaking. Distinguishing between various opinions and facts can be challenging. Aim to impartially document the proceedings. As the recorder, listen attentively and don't hesitate to seek clarification and ask questions from the President or Chair if necessary.

All meetings may be recorded (either through audio or video) by one Board Member, preferably the Secretary, with the sole purpose of accurately documenting the business conducted during the meeting. It is essential to inform all attendees at the outset that the meeting will be recorded, and anyone can request a pause in the recording during discussions. All recordings should be deleted once the minutes have been compiled.

Courtesy Seat: Only individuals included in the meeting agenda are authorized to address the assembly. However, a "Courtesy Seat" privilege may be granted to a non-Board Member visiting the meeting. The meeting minutes will include a notation such as: "A courtesy seat was granted to Officer Brown who discussed traffic dismissal concerns."

During a formal vote, the method and tally of votes for each side should be documented. The Secretary should have blank sheets of paper available for secret ballot voting and assist in the vote count when requested. Reports from officers, standing committees, and special committees may be appended to the minutes to avoid duplicating information. The Secretary can provide a concise summary of the activities, and any motions arising from the reports must be included in the minutes. An example of a Tellers Report for voting can be found in the LAPT A Toolkit: Elections and Nominating Committee.

At the end of a meeting, a motion to adjourn is only necessary if all items on the agenda were not covered.

CONTENT OF MINUTES

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



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

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

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

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

Minutes Committee: It is permissible, if the meeting occurs less often than quarterly, to authorize a committee to approve the minutes on behalf of the assembly during the meeting. The annual LAPTA General Membership Meeting is a good example. It would be futile to get the minutes one year later. A script is in the President’s toolkit.

Nothing is ever erased once the minutes have been approved and signed. Any member has a right to examine the minutes of the General Membership Meetings, but this right must not be abused. The original minutes must not be released from the custody of the Secretary except upon the written order of the President. If a committee needs

records held by the Secretary, the Secretary provides a copy to the committee chair after consulting with the President.

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

MOTIONS

Motions are statements that describe a proposed action or decision. The process of making motions ensures that all decisions are fairly discussed and voted on. It is necessary to record motions verbatim, as well as the name of the individual who made them. There is an optional **Motion Form** at the end of this section to assist in recording motions properly. Record the name of the person who made the motion, whether there was a second (this second name is not needed), the date, the exact verbiage of the motion, verbal or ballot vote, and whether the motion passed or failed. When there are multiple motions in a meeting, keep the motions numbered and in order. If a motion is withdrawn, it is as though it never happened. Only record the final version of a motion.

When typing a motion in the minutes, indent it and use bold and all caps. Here is an example:

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

ELECTIONS

When writing the minutes for election results, use the following sample template for an uncontested election: No nominations from the floor were submitted. A verbal vote was taken, and the slate of officers was accepted. The elected Board of Directors for 2024 ABC PTA is:

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

Include another paragraph listing the previous officers' names who will be removed from the account. Include names of those officers authorized to receive debit cards if the PTA chooses to do this. Caddo Parish does not allow this. See the Bylaws and the Elections and Nominating Committee Toolkit for further details on elections.

RECORDS RETENTION

Digital and paper records are acceptable.

Permanent

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

7 Years

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

3 Years

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

1 Year

- Routine Emails

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.

SAMPLE AGENDA

Madison High PTA Board Meeting

January 19, 2023

AGENDA

Meeting called by Tera

Executive Board Members:

President: Tera
Treasurer: Carolyn

Vice-Presidents: Shelley & Beth
Secretary: Stephanie

Committee Board Members:

Membership: Katie
Volunteer: Sandra
Fundraising: Amy, Melanie, Christen
Hospitality: Jenn, Amy, Elizabeth
Room Mom: Kristy
Reflections Program: Amy

Beautification: Bessy
Newsletter: Angie, Doris
Uniforms: Caroline
Grants & Awards: Christie
Teacher Rep: Erin, Sarah

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

Secretary's Report – Minutes.....Stephanie

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

President's Report –.....Tera

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

Committee Reports

- Principal's ReportMrs. Welch
- Membership Committee.....Katie
- Volunteer Committee.....Sandra
- FundraisingTera
- HospitalityJenn
- Room Moms.....Kristie
- Reflections.....Shelley
- Art ParentsAmy
- Beautification.....Bessy
- Library Committee.....Amy
- NewsletterAngie
- UniformsCaroline
- Grants & Awards.....Christie
- Teacher Representative.....Sarah

New Business

- Upcoming Flyers/EventsBeth

Old Business

Important Dates

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

AdjournmentTera

SAMPLE MINUTES

ABC PTA Board of Directors Meeting

November 12, 2022

ABC Faculty Lounge

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

Opening: PTA Mission read by Kayla Pagel

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

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

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

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

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

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

Committee Reports:

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

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

Hospitality:

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

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

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

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

Traffic:

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

Unfinished Business: Backordered fundraising prizes are still on order.

New Business:

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

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

Beth Cleveland

Beth Cleveland, Secretary (or Secretary Pro-tem)

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

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

MOTION FORM

I move that: _____

Printed name of person who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Did not need a Second Passed Failed Amended Withdrawn

I move that: _____

Printed name of person who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Did not need a Second Passed Failed Amended Withdrawn

ROSTER SIGN-IN SHEET

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

Local PTA Units shall take inventory on a yearly, if not monthly, basis. This allows the PTA to know what assets it has and the value of that inventory as of the date on the form. Inventory includes items such as t-shirts, prizes, gifts, donated items, food, decorations, and more. Take all necessary steps to avoid theft and fraud with the PTA.

Date of Inventory _____ Person #1 doing inventory count _____ Person #2 doing inventory count _____

| Quantity | Value | Name | Item Description | Note |
|----------|-------|------|------------------|------|
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Number of pages of Inventory Accountability Form: Page _____ of _____ total pages.
We agree to the findings of this Inventory Accountability Form:

Date of Inventory _____ Person #1 Signature _____ Person #2 Signature _____

This Inventory Accountability Form shall be presented at the next Board Meeting and filed with the Treasurer and Secretary as part of the official record of the PTA.

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.

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

| Date | Board Member Name | Position | Signature |
|------|-------------------|----------|-----------|
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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.

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.

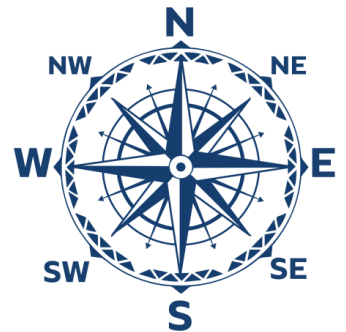
SETTING GOALS

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.

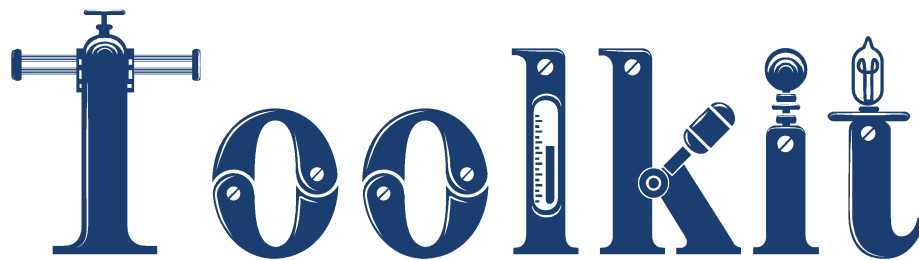
Don't:

- **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.



2024–25 PTA Leader



Section 6: Membership

LouisianaPTA.org/membership



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MEMBERSHIP INTRODUCTION

The PTA (Parent Teacher Association) plays a pivotal role in fostering connections among parents, educators, and school administrators, while also offering vital support for essential school initiatives. One of the primary objectives of the PTA is to shine a spotlight on its often unseen efforts, underscoring the profound value it brings to individual children. It emphasizes that membership can be as involved or as flexible as one's schedule permits. Exclusive privileges, such as the right to propose motions, engage in debates, and participate in PTA business decisions during General Membership Meetings, are reserved solely for members. Furthermore, PTAs may extend member-only perks, including access to directories, expedited entry at events, discounts on school supplies, and spirit wear, among others.

Membership stands as the cornerstone of the PTA, with the Membership Chair holding the responsibility for enlisting as many new members as possible. This role is undeniably one of the most crucial within the organization because, without members, the PTA's initiatives cannot come to fruition. Membership is open to anyone who aligns with the National PTA mission and purposes. Inclusivity is a core commitment of the PTA, striving to represent and aid all those involved in nurturing and educating children. The organization actively seeks to embrace a diverse range of cultures, races, ethnicities, and beliefs, as well as individuals from varying economic and educational backgrounds. PTA has three levels: the Local PTA Unit, Louisiana PTA at the state level, and National PTA at the national level. National PTA stands as the nation's largest and oldest nonprofit volunteer organization advocating for children's well-being. Its core mission revolves around enhancing the lives of all children and adolescents. Given the broad geographical, cultural, and economic diversity of its membership, the PTA holds immense potential to make a positive impact on every child.

This Membership Toolkit serves as a comprehensive guide for effectively communicating the value of PTA membership. It is designed to complement existing efforts to recruit new members by providing consistent messaging and graphics for use in emails, websites, and social media platforms. For graphics, resources, and documentation, visit [PTA.org](https://pta.org) and select "Membership Resources" from the "Run Your PTA" menu. LAPTA extends its heartfelt appreciation to Membership Chairs for their dedicated work on behalf of the PTA!

PROCEDURE BINDER

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

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

Tab 2: LAPTA Toolkit: Membership plus other relevant sections and the Bylaws

Tab 3: Membership Roster

Tab 4: Agendas & Minutes

Tab 5: Notes, flyers, email campaigns, etc.

Tab 6: Welcome Packet

Tab 7: Other

GETTING STARTED

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

1. Email all Board Members, teachers, and last year's members inviting them to re-join for the new year. Speak to the previous Membership Chair and ask for a copy of the previous year's roster.
2. Challenge each Executive Committee member to recruit five members.
3. Ask the principal to routinely promote the value of PTA to the faculty and promote the PTA on the school marquee and other campus advertising opportunities. Ask each school board member to join the PTA.
4. Create a PTA Welcome Packet to market the PTA to the families. Provide the school office with extra packets and Welcome Letters for new families.
5. Work with a committee to develop a plan to accomplish the membership goals and a theme for the year.
6. Take advantage of all the free resources at LouisianaPTA.org/membership.
7. Visit PTA.org under the Membership menu for lots of ideas and support documents.

MEMBERSHIP CHAIR DUTIES

- Register online with LAPTA at LouisianaPTA.org/register.
- Regularly submit dues and membership rosters at LouisianaPTA.org/membership. Note that Local Units must purchase a minimum of 30 memberships from LAPTA per year but must submit the true number.
- Attend all Board meetings.
- Understand and share the value that a thriving membership brings to the school and community.
- Form a committee to help plan, recruit, and recognize members.
- Use National PTA's annual theme or develop a unique message.
- Invite every family and faculty member to join PTA.
- Provide repeated opportunities for people to join at every PTA event, on social media, and in all PTA communications.
- Distribute membership thank you notes with membership benefits listed at PTA.org to all members.
- Before each meeting, provide the Secretary and President with the most current membership roster.
- Frequently update the school families, local community, and businesses on progress toward the goal.
- Celebrate membership successes with the school and on social media.

SUBMIT MEMBERSHIP DUES

When someone joins a Local PTA Unit, they also become a member of Louisiana PTA (LAPTA) and National PTA. Each unit must submit to LAPTA \$3.50 per member. From that, National PTA receives \$2.25 and LAPTA retains \$1.25. LAPTA has the responsibility of forwarding National PTA's portion. The Local Unit is obligated to remit dues for every person who joins their PTA. A unit's Active Affiliation could be in jeopardy if it does not submit dues for the actual number of members. This also puts their nonprofit status in jeopardy which would put them at risk of having to pay income tax to the IRS.

Membership in a PTA is required for the privilege of voting, holding office, and attending the LAPTA and National PTA Conventions as a voting delegate. All Board Members are required to submit membership dues to their Local PTA. See the Roster Sign-In Sheet at the end of this section to help track who still owes dues on the Board. Joining one PTA does not give voting privileges in another PTA. Membership is valid from date of issue through June 30 of each year. The Treasurer deposits checks and cash collected from the membership drive as soon as possible. Memberships dues shall be submitted monthly to LAPTA.

STEP 1: The first step to processing memberships is to go to LouisianaPTA.org/submitdues. Click "PAYMENT LINK." Purchase the number of individual memberships sold by the PTA. The cost is \$3.50 each. The exact number of memberships sold to their members must be purchased. LAPTA forwards the \$2.25 dues to National PTA.

STEP 2: Download the spreadsheet "LAPTA Local PTA Membership Report" from LouisianaPTA.org/membership. In the spreadsheet, enter the information in the top section and then last name, first name, and email for every member. After submitting dues, **email the Membership Report to office@LouisianaPTA.org**. Repeat monthly.

MEMBERSHIP CAMPAIGN THEME

Visit PTA.org and select Membership Resources under the “Run Your PTA” menu where you can find graphics, resources, and support documentation. While a PTA can choose their own annual membership theme, National PTA chooses a phrase to motivate and recruit new members and reinforce the value of PTA membership. The three membership themes are: PTA for Your Child, You Belong in PTA, and PTA is a Verb!



Louisiana PTA also has its annual theme which is **Join the PTA Adventure** and **Join the PTA Adventure!** The LAPTA graphic is available for Local PTA Units to use and customize to their own PTA name on Canva at canva.com/design/DAF8QcdQrKU/WBJ93JIBEPyrHB2lhmqcg/edit or email Membership@LouisianaPTA.org to request a link to the Canva graphic.

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

How do you PTA? PTA is no longer a noun. It's a verb, an action plan working to support the success of all children! Members can give money by joining and donating, volunteer their time and effort, or help grow the PTA presence at all levels as an advocate for children's education. Create a dynamic Membership Welcome Packet at the start of school which can contain everything PTA for the upcoming year. Create a concise form for members to join PTA. Offer online options to join on a platform such as CheddarUp.com.

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

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

Top 10 Reasons People Join PTA by Rank:

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

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

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

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

One of the responsibilities of Membership Chairs is to celebrate successes. It is critically important to engage with members. When successful, shout it from the rooftops! People want to be a part of a successful group. Celebrating success accomplishes two goals: appreciating members and aiding recruitment. Sharing accomplishments also reminds members that their PTA is part of a larger association that does care about them. Encourage members to participate by creating volunteer opportunities and providing programs that will be of value. Members indicated the number one reason they join PTA is to support their school. Give them the opportunity to have influence by joining, participating, and volunteering. Once they get involved in smaller ways, they may be comfortable with and interested in taking on a bigger role.


CREATE YOUR OWN PTA VALUE MESSAGE

When seeking PTA members, remember to always make an explicit ask to join. Clarify what PTA membership means and that it is different from volunteering. Remember that *everyone* belongs in PTA, and that *everyone* is interested once they understand the association's value and role. To create a custom PTA message, use the following three high-value areas for the different audiences the PTA wants to recruit. For each value, answer three questions and then combine it into a Value Message. Below are sample answers put together to create an impactful statement. See the complete details on creating custom messages with many more sample answers at [PTA.org-how-to-create-your-own-pta-value-message.pdf](https://www.pta.org/how-to-create-your-own-pta-value-message.pdf). Under *Run Your PTA* menu, hover over *Membership*, and select *You Belong in PTA*.

Value Message 1: Our PTA Creates Connections

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

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



PTA
Creates
Connections

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

Our PTA

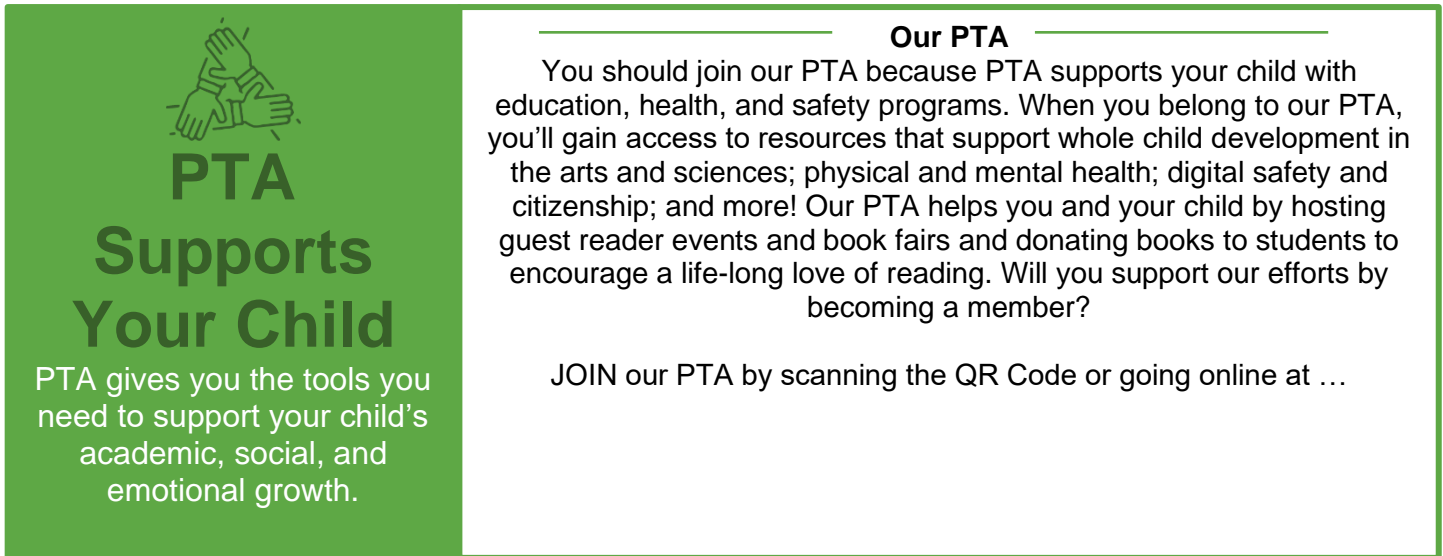
You should join our PTA because your membership can help you build a village to support your child and connect you locally and to a nationwide network that supports all children. When you belong to our PTA, you'll connect to important school and community resources. Being a member of our PTA will help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

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

Value Message 2: Our PTA Supports Your Child

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

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

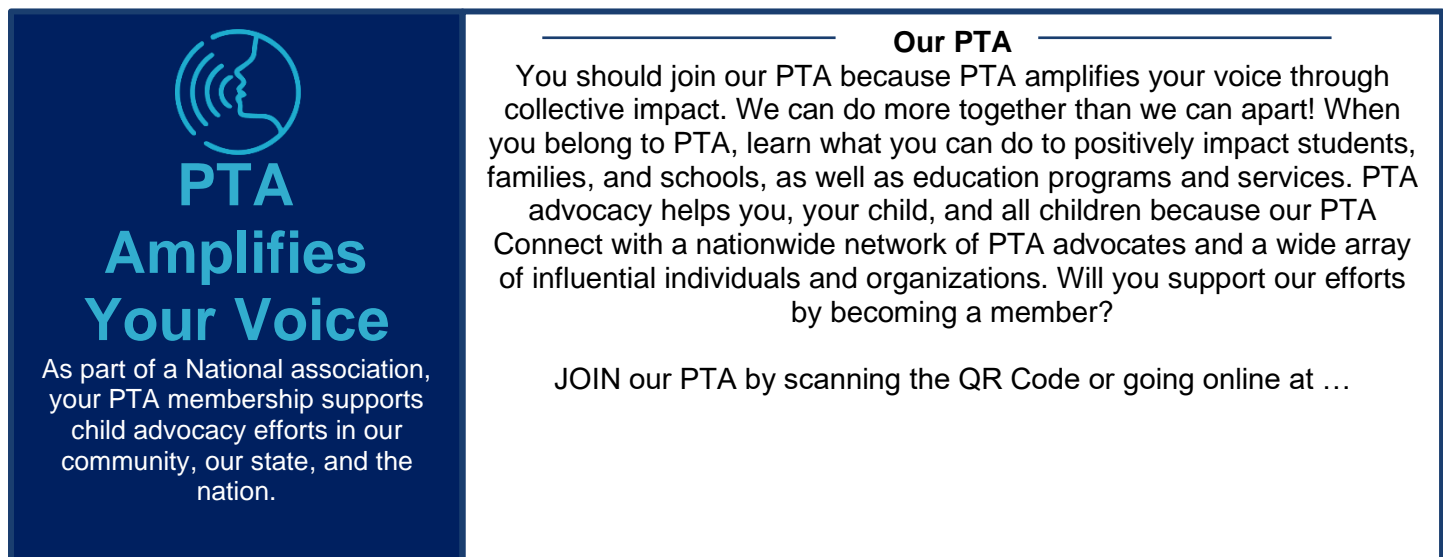


The graphic features a green background on the left and a white background on the right. On the left, there is an icon of three hands holding each other, with the text "PTA Supports Your Child" in large green letters. Below this, it says "PTA gives you the tools you need to support your child's academic, social, and emotional growth." On the right, the text "Our PTA" is centered at the top. Below it, a paragraph explains the benefits of joining the PTA, such as access to resources for child development and support for reading. At the bottom, it says "JOIN our PTA by scanning the QR Code or going online at ...".

Value Message 3: Our PTA Amplifies Your Voice

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

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



The graphic features a dark blue background on the left and a white background on the right. On the left, there is an icon of a profile of a head with sound waves, with the text "PTA Amplifies Your Voice" in large light blue letters. Below this, it says "As part of a National association, your PTA membership supports child advocacy efforts in our community, our state, and the nation." On the right, the text "Our PTA" is centered at the top. Below it, a paragraph explains the benefits of joining the PTA, such as collective impact and access to a nationwide network of advocates. At the bottom, it says "JOIN our PTA by scanning the QR Code or going online at ...".

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

COLLECTING DUES ONLINE WITH CHEDDARUP

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

MONTHLY MEMBERSHIP CHALLENGES

LAPTA has a goal of 10,102 members for our 102nd year in 2024–25 and we need the support of the Local PTA Units to help reach that goal! To be eligible for awards, all PTAs must have Active Affiliation status. A PTA can strategically submit dues to qualify for more awards. The qualifying PTA units will receive recognition and automatically be entered into a **monthly drawing for \$100!**

August Welcome Back, Yall Award

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

September Jazz Award

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

October Swamp Monster Award

Don't let the Rougarou get you before submitting 31 New members by October 31.

November Harvest Award

Harvest 50 new members and file Active Affiliation Report with LAPTA by November 30.

December wONederland Award

Achieve 100% of previous year's membership by December 31.

January 2025 Kick Off Award

Kick off the new year by submitting dues for 25 new members by January 31.

February Happy Birthday, PTA Award

Celebrate National PTA's birthday on February 17 by adding 17 new members by February 28.

March Krewe of Membership Award

Throw us a dozen new members by March 31.

ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 10,102 members for our 102nd year in 2024–25 and we need our Local PTA Units to help reach that goal! Qualification for awards is done without application. LAPTA uses the information on the top of the Excel Local PTA Unit Membership Report emailed to office@LouisianaPTA.org by March 31. Active Affiliation is required. The annual membership awards are announced in April.

Challenge Champ Award

Earn five or more Monthly Membership Challenges

Membership Matters Award

Increase membership by 10% over the previous year

All Star PTA Award

Reach the LAPTA membership goal at least three consecutive years.

Golden Apple Award

100% membership of teachers and administrators

Golden Magnolia Award

Membership of at least 100% of student enrollment

MEMBERSHIP CALENDAR

July

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

August

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

September

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

October

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

November

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

December

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

January

- Kick off a new campaign.
- Continue to recruit new members and try to reinstate dropout members.
- Evaluate progress and plan any new approaches.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- January Welcome Back Challenge:** Keep up the momentum with 10 new members by January 31

February

- Celebrate National PTA's birthday on February 17 which started in 1897.
- Invite new families to join. Continue to recruit members.
- Honor someone from your school with honorary National PTA Lifetime Membership.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- February Founders' Day Challenge:** In honor of PTA Founders on February 17, add 17 new members.

March

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

April

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

May

- Celebrate your success. Breathe a sigh of relief and let go graciously. Thank you for a great job!
- Pass the procedure book and other records to the new Membership Chair.
- Send a final thank you to your members.
- Ask them to join PTA for the next year. Include a link that allows the purchase of dues for the following year. Dues may be submitted at the end of a year to apply to the following year.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

June

- Form the new membership committee for next year. Work on a new membership theme and graphics.
- Work on a new Membership Welcome Packet with the Executive Committee.
- Submit the final accurate count of member dues for the year at LouisianaPTA.org/membership.

HASHTAG AND EMAIL SIGNATURE

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



PTA For Your Child

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

[NAME], [PTA LEADERSHIP POSITION]

[PTA NAME]

[PHONE NUMBER], [EMAIL ADDRESS]

How Do You PTA? PTA For All Children!

SAMPLE “MEMBERSHIP ASK” EMAIL

SUBJECT: PTA For Your Child!

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

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



Sincerely,

Beth Cleveland, Membership Chair

MHSPTA.membership@gmail.com

(555) 555-5555

#PTAForYourChild

How Do You PTA? PTA For All Children!

CUSTOMIZE THE PTA LOGO

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

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



SAMPLE "MEMBERSHIP ASK" FLYER

Springfield Elementary PTA Membership Sign-Up

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

Mental Health Speaker
\$25 Teacher Mini-Grants

Campus Beautification
Skipper Scholar Breakfast

Staff Appreciation Lunches
Breakfast of Champions

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

PTA MEMBERSHIP

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

\$ _____

Cash or check to SES PTA, or credit cards at SpringfieldPTA.CheeddarUp.com.

I'D LIKE TO VOLUNTEER FOR

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

| | | |
|------------|-------------|-------------|
| Name _____ | Phone _____ | Email _____ |
| Name _____ | Phone _____ | Email _____ |

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

SAMPLE THANK YOU EMAIL AND NOTE

SUBJECT: PTA For Your Child Thank you!

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

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

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



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

SES PTA Membership Thank you!

Student/Member Name

Teacher

Grade

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

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

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

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

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

2024–25 PTA Leader



Section 7: Advocacy

LouisianaPTA.org/advocate



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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.

INTRODUCTION TO ADVOCACY

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

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

The *LAPTA Toolkit: Advocacy* will help guide the PTA to become an advocate. It includes tools to tackle an issue, plan out and implement an advocacy campaign, and various tips and tools to help along the way.

Always notify LAPTA of any advocacy plans and actions because it needs to align with any stances that National PTA has implemented. LAPTA would also like to support the advocacy of Local PTA Units and help them reach their goals. LAPTA is your ally!

GATEWAY TO ADVOCACY: WHY ADVOCATE?

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

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

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

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

Top 5 Ways to Help Members Advocate for Children

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

The logo for Louisiana PTA is a dark blue rectangle. Inside, the words "LOUISIANA PTA" are written in a large, bold, white, sans-serif font. Below this, the phrase "Established 1923" is written in a smaller, white, cursive script font.

LOUISIANA PTA
Established 1923

ADVOCATING AN ISSUE: PLANNING

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

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

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

Advocacy Strategy Chart

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

SETTING GOALS

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

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

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

RAISING PUBLIC AWARENESS

Sometimes advocacy efforts are focused just on educating the community about an unknown issue. A campaign can raise awareness in the community about an issue. Raising public awareness requires a concentrated effort to educate the community in as many ways as possible. Form coalitions with other organizations that agree with the PTA on the issue. Here are some ways a PTA can raise public awareness:

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

CONDUCTING CANDIDATE OR ISSUE FORUMS

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

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

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

- **School Board Candidate Forum:** PTA can hold a forum to allow the community to hear from and ask questions of the candidates. Prepare questions ahead of time for each candidate to answer and possibly allow questions from the audience. All candidates must have equal opportunity to answer each question with a limited response time. Treat all candidates the same, particularly since many school board members have come from local PTAs.
- **Local Representative Candidate Forum:** The PTA may hold a candidate forum to discuss the issues important in the community. It might be more effective to do a joint venture with another association or group. Become a part of the community's social media groups where concerns are voiced and information shared to engage the PTA community.
- **Ballot Issues Forum:** To host a forum for a ballot issue, form a panel of approximately five people who are knowledgeable on the subject, preferably some for and some against it, who can answer questions on the ballot issue. The PTA may want to consider having one person from the school board, one administrator, one community member, and two others. Consider inviting a local state legislator to be on the panel, as well. The

PTA might want to skip the gathering of questions ahead of time and go strictly with questions from the audience. If the PTA uses this approach, have a couple of PTA volunteers to screen the questions from the audience so that the same question is not asked repeatedly. Give each panelist five minutes or less to introduce themselves and to speak on the ballot issue which allows the audience to know who they are.

- **Bond Elections Forum:** A school district might want to issue bonds to fund district needs that cannot be met merely by the tax dollars for public schools. The issuance of the bond must be approved on a ballot by the voting public. PTAs can be very helpful by working with the school district to conduct information sessions on the bond issue. Local PTAs need to take a vote at their local level and take the position of the majority on whether to support the bond election or not. PTAs may publicly demonstrate their support through their usual communication channels, including the posting of yard signs, buttons, t-shirts, etc.
- **Boundary Changes Forum:** PTAs can facilitate a forum to learn about proposed school boundary changes. If the PTA is unable to conduct a forum, formulate a questionnaire that can be completed by school district personnel and send it to the local newspaper with the school district's responses. Remember to keep it nonpartisan, nonsectarian, and open-minded as this is a way to help the membership become knowledgeable and make informed decisions during election time.

How to Conduct a Candidate/Issue Forum

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

Questionnaire Format for the Forum

The written questionnaire might consist of 10 to 15 questions for the candidate to complete and return prior to the interview or forum. Five to eight questions could be selected to be asked at the forum. Consider questions that are relevant and pertinent to the school district. As attendees register for the candidate forum, give them an index card on which they may write the questions they wish to ask. A committee of forum planners should weed out duplicates and inappropriate questions. Use the most relevant questions to form the oral interview questions for the forum.

FORUM TIMELINE

60-90 Days Before Forum

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

45 Days Before Forum

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

30 Days Before Forum

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

7 Days Before Forum

- Send reminder emails.
- Organize the candidates' answers to the questions in an easy to read chart form.
- Gather up a stopwatch, yellow and red banners, bottles of water for candidates and the moderator, index cards and pencils, and name place cards for each candidate and the moderator.

Day of the Forum

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

After Forum

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

IMPLEMENTATION: DEVELOPING YOUR MESSAGE

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

Creating a Message Box

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

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

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

Creating a Message

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

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

Framing the Message

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

Different Types of Messages

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



RESOLUTIONS AND LEGISLATIVE POSITIONS

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

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

Local PTAs can propose new resolutions or legislative positions to LAPTA. LAPTA considers all submissions upon the recommendation of the LAPTA Resolutions and Directives Committee. Submissions must be received at least 60 days before the annual LAPTA General Membership Meeting and need approval by LAPTA BOD to continue. Emergency resolutions may be submitted only if the urgency of the subject matter arose after the deadline. LAPTA reserves the right to edit the resolution, except for intent. The submitting group provides copies to the General Membership. An affirmative two-thirds vote is required for adoption. The resolution must further the PTA mission, align with National PTA and LAPTA policies, be a matter of national or state scope, be a feasible action for LAPTA to undertake, and have the support of the submitting PTA.

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

USING THE MEDIA

The media provides the best opportunity to get the message in front of the most people when campaigning to raise awareness of an issue, educate about an issue, or advocate for change. Consequently, include a media plan in the advocacy campaign. Each media platform has its advantages and disadvantages. Spread media efforts across as many platforms as possible since they often reach different audiences.

- **Newspapers:** Local newspapers are a great way to get the message in front of the community. Daily papers can be useful through letters to the editor, op-ed pieces, articles by reporters, and meetings with the editorial board. Weekly papers are often locally focused and might run a press release word for word.
- **Radio:** There are very few locally focused radio news stations, but some local stations may have call-in talk shows that can be a good way to get an issue out to the public.
- **Television:** TV news tends to focus more on visual-oriented stories, so think of ways to present the issue visually for TV coverage. Some options might be a walkthrough of a school to illustrate needs. Keep in mind that while a TV reporter may do a 10 minute interview for a story, they are likely to only use 30 seconds of it in the story. Make sure to bring every question around to the key points.
- **Social Media:** Social media can be a blessing and a curse. It provides an opportunity to reach a broad audience, engage people in advocacy, and energize younger groups that might not see any other media. However, it is also possible to have a strong backlash on social media often from people not in the community and especially if someone with a large following shares a post. Going viral can cut both ways. Make sure the social media messages have a consistent and easy-to-use hashtag and a consistent graphic identity. Be prepared to engage with some replies to posts but remember not to feed the trolls. The mute and block tools are there for a reason. Do not be afraid to use them.

Activities that Generate Media Interest

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

HOW TO WRITE A PRESS RELEASE

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

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

SAMPLE THANK YOU LETTER TO A LEGISLATOR

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

Dear [Senator/Representative] [Last Name],

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

Sincerely,
Signature
[PTA Name, Position]

ADVOCATING WITH YOUR SCHOOL BOARD

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

Using the School Board Public Comment Period Effectively

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

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

LAPTA ADVOCACY AWARD FOR A PTA

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025

Apply at LouisianaPTA.org/awards
Quantity Offered: 2

The LAPTA Advocacy Award is available for up to two Local PTA Units. The purpose of the Advocacy Award is to recognize a PTA Unit who has worked to make a change for the betterment of children. Advocacy is the heart of PTA and should be the priority of all. Every PTA should have a year's worth of advocacy that they could submit!

There are a multitude of ways PTAs or students can advocate to make all children's potential a reality. See the LAPTA Toolkit Section 7: Advocacy for insights and suggestions.

Entry information includes Local PTA Name, LUR#, parish, PTA contact, PTA position, PTA budget totals, and documentation of the advocacy work. Describe the advocacy work. Who was involved? What was the initial plan? Did the plan change over time and how? Was the work publicized and to whom? What impact did the advocacy work have on children or who was the beneficiary of the work? Be as thorough and descriptive of the advocacy work as possible, which can be more than one project, event, or item. The format can be PDF, Word file, pictures in any format, etc. All applications will be reviewed blindly by the LAPTA Board of Directors.

Submit application by March 31, 2025, at LouisianaPTA.org/awards.

LAPTA ADVOCACY AWARD FOR A STUDENT

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025

Apply at LouisianaPTA.org/awards
Quantity Offered: 2

The LAPTA Advocacy Award is available for up to two Louisiana students who are in high school or younger. The purpose of the Advocacy Award is to recognize a student who worked to make a change for the betterment of children. Advocacy is the heart of PTA and should be the priority of all. It's never too soon for students to get involved in advocacy work!

There are a multitude of ways students can advocate to help achieve PTA's mission which is to make all children's potential a reality. See the LAPTA Toolkit Section 7: Advocacy for insights and suggestions.

Entry information includes the student's contact information and school, parental consent, the PTA name that they are a member of, PTA's parish, detailed and complete documentation of the advocacy work, and two letters of recommendation. Describe the advocacy work. Who was involved? What was the initial plan? Did the plan change over time and how? Was the work publicized and to whom? What impact did the advocacy work have on children or who was the beneficiary of the work? Be as thorough and descriptive of the advocacy work as possible, which can be more than one project, event, or item. The format can be PDF, Word file, pictures in any format, etc. All applications will be reviewed blindly by the LAPTA Board of Directors.

Submit application by March 31, 2025, at LouisianaPTA.org/awards.

2024–25 PTA Leader



Section 8: Diversity, Inclusion, & Outreach (DIO)

LouisianaPTA.org/inclusion



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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.

INTRODUCTION

PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child. DIO supports every child with one voice, no matter their race, ethnicity, zip code, income, gender identity, sexual orientation, immigration status, or abilities. LAPTA recognizes that advancing DIO is an integral part of PTA’s work and its vision of making every child’s potential a reality.

Diversity is the range of human differences such as race, ethnicity, gender, gender identity, sexual orientation, age, social class, physical ability or attributes, religious or ethical values system, national origin, and political beliefs.

Inclusion is active, intentional, and ongoing engagement in diversity in which different individuals or groups who may otherwise be excluded or marginalized are accepted, engaged, and welcomed.

Outreach is a commitment to create an inviting climate, to form respectful relationships and to share important information about PTA with all community members. Outreach includes efforts that focus on enlisting the participation of all parents, students, and community members in the educational process, and establishing collaborative relationships focused on positive impacts by:

- Using languages represented within the community at PTA meetings and in PTA communications.
- Working to build representative leadership and voice within the PTA of all community groups. The makeup of the BOD should reflect the makeup of the school community.
- Understanding that everyone has value.
- Including students, teachers, community and extended family members.

PROMOTE DIVERSITY IN THE SCHOOL

As a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child, PTAs are well-equipped to foster the principles of Diversity, Inclusion, and Outreach (DIO) in their schools and community. Diversity is the strength of PTA! Those who are intentional in their DIO efforts are most likely to experience great outcomes that benefit all children and their families rather than just isolated patches of success.

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

Form a DIO Committee with clearly defined charges and goals that are periodically reviewed and updated. PTA needs to seek a diverse membership that reflects the diversity of the student body and community it serves through targeted outreach efforts. Consider which groups are less likely to join the PTA or participate in meetings and events. To achieve successful outreach, learn about other cultures, traditions, challenges, and restrictions of the groups needing outreach.

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

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

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

HOLD AN INCLUSIVE PTA MEETING

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

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

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

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

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

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

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



DIO RESOURCES

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

Commitment to DIO:

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

Local Leader DIO Guidance:

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

How to Welcome Diverse Perspectives Into Your PTA:

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

DIO Frequently Asked Questions:

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

DIO Community Profile Template:

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

Enhancing DIO Facilitator's Guide:

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

DIO Action Plan Template:

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

Inclusive Holiday Planning:

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

Inclusive Communication During the Holidays:

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

Inclusive Curriculum in K-12 Schools:

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

LGBTQ Glossary:

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

How to Talk About Race and Justice in America:

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



2024–25 PTA Leader



Section 9: Elections & Nominating Committee

LouisianaPTA.org/elections



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NOMINATING COMMITTEE

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

The committee is elected by the General Membership, as described in Article IX, Section 3 of the LAPTA Local Unit Bylaws Template, May 2024 revision, which states:

The Nominating Committee of three or five members shall be appointed by a majority vote at a General Membership Meeting with 20 days' notice and at least one month before elections. The committee or the President shall appoint its chair. The committee nominates eligible individuals to serve for each available office and completes the Nominating Committee Report. Further nominations may be made "from the floor." Such nominees must submit written notice of their intent to run to the President and Secretary at least 15 days before elections and have their qualifications vetted. The final and complete list of nominees is published four days before elections. The committee presents its slate of nominees at a General Membership Meeting scheduled in the month(s) designated in Article VI, Section 2.

The Secretary reads those portions of the Bylaws pertaining to the nomination and election of officers to the membership before the election of the committee. Form the committee at a General Membership Meeting before the meeting that will have elections. This would probably be the first or second General Membership Meeting of the year.

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

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

Select one nominee for each officer position and be prepared to state qualifications of nominees. Make committee decisions by ballot with a majority vote. Prepare a written report signed by all committee members who agree with the report. A sample report is at the end of this section. Reconvene the committee if a slated candidate withdraws.

The committee shall present the report to the Board of Directors for information only. The Committee Chair may present the report to the current PTA President as a courtesy, prior to presentation to the Board. Publish the Nominating Committee Report **at least 20 days** before the election meeting to the General Membership.

On elections day, the Nominating Committee's report is usually read by the Committee Chair during the meeting. The Nominating Committee is dissolved once the report is read. The report is passed to the President, who opens the floor for pre-submitted nominations from the floor and conducts the elections. Only a member who has not signed the report can nominate from the floor.

ELECTIONS

Before the election's General Membership Meeting, review Article VI and Article IX of the Bylaws which describes when and how the PTA elects. Publicize the slate of officers at least 20 days before the election meeting. Always have the current membership roster on hand because only current members may vote. After the Nominating Committee presents its report to the General Membership, the presiding officer conducts the election even if they are a nominee. The presiding officer presents each nominee individually and includes further nominations from the floor. Nominations from the floor need to be received in writing 15 days before the election. If the nomination is for a position without a recommendation from the Nominating Committee, then that nomination can be received on the spot without the 15 day notice requirement.

Nominations from the Floor: Any self-nominating person not included on the Nominating Committee's slate must notify the President and Secretary in writing about their intent to run and for which position. This must be received at least 15 days before elections. The final slate of officers with any additional self-nominations (nominations from the floor) is published four days before elections. **New nominations from the floor are not accepted during the elections' meeting unless the Nominating Committee did not have a recommendation for that position.**

Non-Contested Election: If there is only one nominee for a position, it is a non-contested election, and the vote may be by voice. However, if a member requests a vote by ballot for any office, the request must be recognized and voted upon by the membership without debate.

Contested Elections: If there is more than one nominee for a position, it is a contested election. Each person is introduced and given two minutes to speak. The vote must be by ballot with only current members voting. Have paper on hand to distribute. It is permissible to use both voice and ballot voting for one election where offices with only one candidate use a voice vote and offices with more than one candidate use ballot vote.

Voters and Ballots: It is necessary to verify who is a PTA member prior to conducting a contested election by using the membership roster. The presiding officer appoints a Teller Committee. No nominee may serve as a Teller. The presiding officer counts the members eligible to vote in the election. The tellers distribute, collect, and count ballots and provide a signed report to the presiding officer. A nominee may designate a person to observe the ballot count. For each contested office, the Teller Committee Report should include the number of members eligible to vote, the number of votes cast, number of illegal ballots, number needed to elect, list of candidates, and number of votes each candidate received. See the Teller Report Form at the end of this section.

Illegal ballots include two ballots folded together, a ballot including the names of too many candidates, or an unintelligible ballot. If the meaning of an unintelligible ballot is doubtful but the ballot would not affect the results of the election, the ballot may be ignored. If the ballot affects the outcome, it is shown to the chair who should ask the membership for a ruling. The chair of the Teller Committee reads the report for each contested office and gives the report to the presiding officer. The presiding officer rereads the report and announces the results for each office. The secretary enters the Teller Committee Report including counts and totals in the minutes.

An affirmative majority count constitutes an election. If no candidate receives a majority of the votes cast for the office, then it is necessary to re-ballot. The voting members must first be recounted. If a member eligible to vote was not present when the original ballot was cast but arrives in time for another vote, the member is entitled to vote. Following the announcement of the vote, the chair of the tellers moves that the ballots be destroyed. Those elected assume office as specified in the Bylaws. An officer serves until a successor is elected. If a vacancy occurs after the election, the vacancy is filled as prescribed in the Bylaws under Article VI.

ELECTION TIMELINE SUMMARY

The following outlines the steps for a proper election based on standard parliamentary procedure. Refer to the Bylaws for further guidance in Article VI: Officers and Their Election.

1. Pick the election date at a General Membership Meeting during the month specified in the Bylaws.
2. **At least 30 days before elections**, at a General Membership Meeting, form the Nominating Committee. Make a public call for candidates and any self-nominating people (nominations from the floor). The Nominating Committee interviews all candidates.
3. **At least 20 days before elections**:
 - a) Publicize the General Membership Meeting and election date.
 - b) Publish the slate of officers chosen by the Nominating Committee.
 - c) Publicly solicit any other self-nominations or nominations from the floor which must be received no later than 15 days before elections.
4. **Four days before elections**, publish the final slate of officers with any additional nominations from the floor. Publish a reminder for when elections will be held.
5. **Election Day**: Hold elections.
6. **Within 5 days after elections**:
 - a) Publish the results.
 - b) Email the results with names and contact information to LAPTA at office@LouisianaPTA.org.

Here is a **sample** timeline if elections were held on May 1.

- 1) December General Membership Meeting: Form the Nominating Committee.
- 2) March 15 – April 10: Nominating Committee interviews candidates. Public call for any nominees.
- 3) April 11: Publish General Membership Meeting and election date, Nominating Committee's Slate of Officers, and ask for any self-nominations or nominations from the floor.
- 4) April 15: Last day for self-nominations or nominations from the floor.
- 5) April 26: Publish the final slate of officers with any self-nominations or nominations from the floor. Publish a reminder for when elections will be held.
- 6) May 1: Hold elections.
- 7) May 1-5: Publish results from elections. Email results & contact information to office@LouisianaPTA.org.

Enter your dates here:

- 1) _____ Date at least 30 days before elections, hold General Membership Meeting to create Nominating Committee. Interviews begin.
- 2) _____ Date 20 days before elections to publicize meeting, election, slate of officers, & solicit nominations from the floor.
- 3) _____ Date 15 days before elections when nominations from the floor closes.
- 4) _____ Date 4 days before elections to publish final slate of all nominees and meeting reminder.
- 5) _____ Date of elections.
- 6) _____ Date within 5 days after elections to publish results. Email results and contact info to LAPTA.

See LouisianaPTA.org/elections for further information.

SCRIPT FOR NON-CONTESTED ELECTION

President: “The next order of business is the election of officers. The Secretary will read Article VI: Section 5 of the Bylaws pertaining to elections.”

Secretary: Stands and reads the Bylaws section, which says, “**Section 5. Uncontested and Contested Election.** For an uncontested election where there is only a single nominee for an elected position, a verbal vote is acceptable. For a contested election where nominees are proposed both from the floor and from the slate presented by the Nominating Committee, a ballot vote must be used. Proof of membership is required for participation in either election. A majority vote constitutes an election.”

President: “The Nominating Committee Chair will read the report of the Nominating Committee.”

Nominating Committee Chair: “Mr./Madam President, the Nominating Committee recommends the following slate of officers: for President, [name]; for Vice-President(s), [name(s)]; for Treasurer, [name]; and for Secretary, [name].”
(The chair hands the written report to the President which is at the end of this section.)

President:

“For President, [name] has been nominated by the Nominating Committee. There were no further nominations for President from the floor. Nominations are closed.”

For Vice-President, [name] has been nominated by the Nominating Committee. There were no further nominations for Vice-President from the floor. Nominations are closed.”

For Treasurer, [name] has been nominated by the Nominating Committee. There were no further nominations for Treasurer from the floor. Nominations are closed.”

For Secretary, [name] has been nominated by the Nominating Committee. There were no further nominations for Secretary from the floor. Nominations are closed.”

“The Bylaws state a voice vote is acceptable when there is but one nominee for an office. All those in favor of the slate of officers as presented, say *aye*. *(pause)* All those opposed, say *nay*. *(pause)* The ayes have it and the slate as presented is elected. Congratulations.”



SCRIPT FOR CONTESTED ELECTION

President: “The next order of business is the election of officers. The Secretary will read Sections 5 of Article VI of the Bylaws pertaining to elections.”

Secretary: Stands and reads the Bylaws section which says, “**Section 5. Uncontested and Contested Election.** For an uncontested election where there is only a single nominee for an elected position, a verbal vote is acceptable. For a contested election where nominees are proposed both from the floor and from the slate presented by the Nominating Committee, a ballot vote must be used. Proof of membership is required for participation in either election. A majority vote constitutes an election.”

President: “The Nominating Committee Chair will read the report of the Nominating Committee.”

Nominating Committee Chair: “Mr./Madam President, the Nominating Committee recommends the following slate of officers: for President, [name]; for Vice-President(s), [name(s)]; for Treasurer, [name]; and for Secretary, [name].”
(The chair hands the written report to the President.)

President: “For President, [name] has been nominated by the Nominating Committee and [name] was nominated from the floor. Nominations are closed.

The president continues this procedure for each office. If a position is uncontested, you can make a motion to accept those positions before moving forward with a vote on the contested positions.

Allow a few minutes for each nominee to speak for themselves.

President: “As President, I appoint [four people] as tellers for the Teller Committee. Will [specific Teller’s name] serve as chair?” *(pause) Teller Committee Report Form is at the end of this section.*

“Current members in good standing are allowed to vote. We have the membership roster here to confirm who is a member. The voting members will rise and count off. A teller will hand you a ballot as you count off. Please take your seat immediately after saying your number and receiving your ballot. Beginning with the member in the front row to my far left, please say ‘one’ and then be seated.”

“There are [number] voting members present. The candidates for President are [name 1] and [name 2]. Using the ballot provided, write your choice for election, and then individually fold your ballot once. Do not combine or fold any votes together.” *(Allow two or three minutes for voting.)*

President: “Have all voted who wish to vote? Will the tellers please collect the ballots?”

Tellers leave to count ballots. The President proceeds with other business until the tellers are ready to report.

President: “The tellers are ready to report.”

Teller Committee Chair: “The Teller Committee reports that the number of members eligible to vote is _____. The number of votes cast is _____. The number of illegal votes cast is _____. The number of votes needed for election is _____. (Candidate Name 1) received (#)_____ votes. (Candidate Name 2) received (#)_____ votes.

President: “[Name], having received a majority of the votes cast, is elected President. Congratulations.”
Continue to the next officer position.

NOMINATING COMMITTEE REPORT

The Nominating Committee of the _____ PTA/PTSA submits the following slate of officers for the year _____:

For President: _____

For Co-President: _____

For Vice-President: _____

For Second Vice-President: _____

For Treasurer: _____

For Secretary: _____

For [Other]: _____

For [Other]: _____

In the event the committee cannot secure a nominee for a position, it remains "open."

Members of the Nominating Committee:

| | | |
|-------|-----------|-------|
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |

*Nominating Committee members sign the report if they **agree** with the nominations. Members not in agreement with the recommended slate of officers do not sign the report and are eligible to make nominations from the floor.*

Retain this official report as part of the Secretary's minutes.

TELLER COMMITTEE REPORT

Name of PTA/PTSA: _____

For the Office of _____

_____ Number of present members eligible to vote

_____ Number of votes cast

_____ Number of illegal votes cast

_____ Minimum number of votes needed for election (majority of the number eligible to vote)

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Teller Chair makes a motion to destroy all ballots after reading the Teller Committee Report.

Members of the Teller Committee:

| | | |
|-------|-----------|-------|
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |
| _____ | _____ | _____ |
| Name | Signature | Date |

Retain this official report as part of the Secretary's minutes.

2024–25 PTA Leader



Section 10: Bylaws, Standing Rules, & Articles of Incorporation

LouisianaPTA.org/Bylaws



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ARTICLES OF INCORPORATION

Louisiana law requires that all nonprofits register with the Louisiana Secretary of State’s office. There is a \$75 initial fee to file Articles of Incorporation with the Louisiana Secretary of State at GeauxBiz.com.

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

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

Search the Secretary of State’s website for the PTA’s current filings [here](#).



COMMERCIAL DIVISION
 225.925.4704
 Fax Numbers
 225.932.5317 (Admin. Services)
 225.932.5314 (Corporations)
 225.932.5318 (UCC)

| Name | Type | City | Status |
|--------------------------------------|------------------------|------------|--------|
| LOUISIANA PARENT-TEACHER ASSOCIATION | Non-Profit Corporation | MANDEVILLE | Active |

Previous Names
 None listed

Business: LOUISIANA PARENT-TEACHER ASSOCIATION
Charter Number: 00702580N
Registration Date: 5/9/1930
Domicile Address
 1131 NORTH CAUSEWAY BLVD
 SUITE 306
 MANDEVILLE, LA 70471
Mailing Address
 P O BOX 4420
 COVINGTON, LA 70434

Status
Status: Active
Annual Report Status: In Good Standing
File Date: 5/9/1930
Last Report Filed: 4/21/2022
Type: Non-Profit Corporation

Registered Agent(s)

| | |
|--------------------------|-----------------------|
| Agent: | KAYLA PAGEL |
| Address 1: | 1131 N. CAUSEWAY BLVD |
| Address 2: | SUITE 306 |
| City, State, Zip: | MANDEVILLE, LA 70471 |
| Appointment Date: | 8/19/2021 |

Officer(s) Additional Officers: None

| | |
|--------------------------|----------------------|
| Officer: | KAYLA PAGEL |
| Title: | President |
| Address 1: | 1131 N CAUSEWAY BLVD |
| Address 2: | SUITE 306 |
| City, State, Zip: | MANDEVILLE, LA 70471 |

| | |
|--------------------------|-----------------------|
| Officer: | BETH MAILLHO |
| Title: | Secretary/Treasurer |
| Address 1: | 1131 N. CAUSEWAY BLVD |
| Address 2: | SUITE 306 |
| City, State, Zip: | MANDEVILLE, LA 70471 |

Amendments on File (4)

| Description | Date |
|--|-----------|
| Amendment | 12/3/1971 |
| Revoked | 8/18/1998 |
| Reinstatement | 5/23/2003 |
| Appointing, Change, or Resign of Officer | 6/26/2017 |

[Print](#)

UPDATING THE BYLAWS

Bylaws are the fundamental governing rules of a PTA that relate to conducting the PTA's business and governance of its affairs. The Bylaws define the primary characteristics of the organization, prescribe how the association functions, and include all rules considered important to the rights and responsibilities of the membership. The Bylaws are a template created by LAPTA that includes required language which cannot be changed by the PTA. The customizable areas are changeable by the PTA to best meet their needs. Download the Bylaws template at LouisianaPTA.org/bylaws.

Amendments are added phrases or verbiage to the Bylaws or changes to the exiting verbiage. This is separate from updating the Bylaws every three years. They may not conflict with National or Louisiana PTA Bylaws and need approval by LAPTA. For this reason, amendments are limited in scope. A PTA may amend their Bylaws at any time. They require approval by the General Membership at a meeting with 20 days' notice and a final approval by LAPTA before it is implemented and incorporated into the official Bylaws of the PTA.

LAPTA requires all Local PTA Units to submit updated Bylaws **every three years**. All current Bylaws have an "LAPTA Approval Date" on page one. To update or amend the Bylaws, take the following steps.

1. Appoint the Bylaws Committee of at least three people by making a motion. To approve the motion, a two-thirds vote is required at a Board of Directors Meeting or a majority vote is required at a General Membership Meeting. The committee needs to include experienced and knowledgeable PTA members. The President should have a copy of the current approved Bylaws or request a copy from LAPTA at Bylaws@LouisianaPTA.org.
2. Obtain the official LAPTA Local PTA Unit Bylaws Template at LouisianaPTA.org/bylaws. The Bylaws Committee meets to complete the proposed Bylaws. Provide the Bylaws Committee with the old Bylaws for reference. Consider recommendations submitted by the Board of Directors and General Membership. For proposed amendments, all changes must meet the needs of the unit, have clear intent, and not conflict with the Louisiana and National PTA Bylaws. Amendments need to reference their article heading, section number, and line number(s) in the Bylaws. The PTA can email the proposed Bylaws to LAPTA to check for any problems or conflicts at Bylaws@LouisianaPTA.org.
3. Notify the General Membership in writing at least 20 days prior to the General Membership Meeting where the vote will occur to update the Bylaws. Share the proposed Bylaws with the membership for review.
4. At the General Membership meeting with a quorum established, present the Bylaws and allow for discussion. Edits may be made during this process by making a motion with an affirmative majority vote. Make a final motion to accept the complete Bylaws with an affirmative majority vote to accept. Amendments to the Bylaws require an affirmative two-thirds vote. (*Amendments* are additional terms or phrases added to the Bylaws Template or are a change to a customizable field for an already approved Bylaws that are not out of date or almost out of date. Ask LAPTA to pre-approve an amendment to avoid delays or problems.)
5. Complete the Bylaws and Amendments Approval Form at LouisianaPTA.org/bylaws.
6. Email both the approved Bylaws Template and the Bylaws Approval Form to Bylaws@LouisianaPTA.org for final LAPTA approval.
7. Give LAPTA 15 days to review and approve the Bylaws or amendments. If there are questions, LAPTA will contact the President. Once approved, they will be stamped "APPROVED" and dated, and emailed to the President. This is the official copy of the Bylaws which expire in three years. Save the digital file in the PTA records and share with the Board. Delete the previous working or proposed versions of the Bylaws.

TIMELINE SUMMARY FOR BYLAWS APPROVAL

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

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

- December 16: Email the approved Bylaws and the Bylaws Approval Form to Bylaws@LouisianaPTA.org.
- December 28: LAPTA reviews the Bylaws, stamps and dates them, and emails the final approved Bylaws to the PTA.

Enter your dates here:

- _____ Date of 1st meeting when Bylaws Committee is formed.
- _____ Dates when the Bylaws Committee will meet to complete the LAPTA Bylaws Template.
- _____ Date at least 20 days before the 2nd General Membership Meeting when the meeting date is publicized and the Bylaws are posted for review by the membership.
- _____ Date of the General Membership Meeting when the Bylaws are presented and voted on.
- _____ Date Bylaws AND the Bylaws Approval Form are emailed to LAPTA at Bylaws@LouisianaPTA.org.
- _____ Deadline for LAPTA to email the final approved Bylaws back to the PTA President.

INSTRUCTIONS FOR BYLAWS TEMPLATE

The Local PTA Unit Bylaws by Louisiana PTA is a fill-in-the-blank form. When completing the form, hover over a field for suggested text and further help and tab from field to field. Changes can only be made to sections of the Bylaws that have fillable fields. Amendments to the Bylaws are subject to LAPTA approval.

Page 1

Fill in the complete PTA Unit's name without abbreviations other than PTA or PTSA, the Local Unit Registration (LUR) number issued by National PTA, the Federal Employer Identification Number (EIN), the complete name And address of the school, and the Louisiana Parish of the school.

Line 3 and 4: Enter the complete PTA name without abbreviations other than PTA or PTSA.

Line 4: Enter the city or town where the school is located.

Page 4

Line 147: Enter the dues amount and type for each membership paid to the PTA. For example, \$10/single, \$7/student, \$7/staff, \$15/couple for 2 memberships, and \$50/business for 5 memberships.

Remember that \$3.50 (current dues as of 2/19/24) per member is paid to LAPTA for National PTA and LAPTA dues portions.

Line 166: Enter the number of Vice-President(s) and the number of Secretary(ies) in Line 167.

Line 172: Enter the month(s) when elections are held at a General Membership meeting such as "April/May". This will need to be included again on Line 373.

Line 175: Enter the number of years for the elected officers' terms which may only be 1 or 2. Note that an elected officer may serve a maximum of two consecutive terms.

Page 5

Line 222: Enter the number of days' notice required before holding an Executive Committee Special meeting. Suggested 2 – 7 days.

Page 7

Line 297: Enter the number of days' notice required before holding a Board of Directors Special meeting. Suggested 2 – 7 days.

Line 327: Enter the number of years for Standing Committee Chairs which may only be 1 or 2 years.

Page 8

Line 366: Quorum is the minimum attendance needed to conduct business at a meeting. Enter the quorum number for General Membership Meetings. Suggested number is 5 if membership is less than 50, 7 if membership is between 50 – 75, 9 if membership is between 75 – 100, 11 if membership is 100 – 125, and so on.

Line 373: Enter at least 3 months for General Membership.

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA Units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template are BOTH required. Visit LouisianaPTA.org/bylaws for details. Bylaws not in compliance will be returned to the PTA. Follow this timeline for all updates:

- 1) Pick the date for the General Membership meeting that will vote on the Bylaws, noting that two meetings are needed to complete the process. A Special Meeting may be called for either one.
- 2) At the first meeting which needs proper notice, appoint the Bylaws Committee of at least three people by making a motion. To approve the motion, a two-thirds vote is required at a Board of Directors Meeting or a majority vote is required at a General Membership Meeting.
- 3) The Bylaws Committee meets to complete the proposed LAPTA Bylaws Template.
- 4) At least 20 days before the second meeting which needs to be a General Membership Meeting, publicly give notice of the meeting and post the Bylaws for review by the membership.
- 5) At the General Membership meeting with a quorum established, present the Bylaws and allow for discussion. Edits may be made during this process by making a motion with an affirmative majority vote. Make a final motion to accept the complete Bylaws with an affirmative majority vote to accept. Amendments to the Bylaws require an affirmative two-thirds vote. (*Amendments* are additional terms or phrases added to the Bylaws Template or are a change to a customizable field for an already approved Bylaws that are not out of date or almost out of date. Ask LAPTA to pre-approve an amendment to avoid delays or problems.)
- 6) Complete the Bylaws Approval Form. Email the Bylaws Approval Form and the Bylaws Template to LAPTA at Bylaws@LouisianaPTA.org. LAPTA will review the Bylaws, give them the final stamp of approval and date of acceptance, and then email the stamped and dated copy back to the PTA.

Local PTA Unit Name

Parish

PTA LUR#

President's Email

President's Phone

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

Choose one. The Local Unit PTA is: Existing PTA Reactivated PTA New PTA

Choose all that apply.

The Bylaws approved by the General Membership are attached.

Approved amendments are listed below with the article heading, section number, and line number(s).

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

President's Signature

Secretary's Signature

President's Name

Secretary's Name

Questions? Email bylaws@LouisianaPTA.org.

STANDING RULES

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

Local PTA Units should have their own personal Standing Rules. Standing Rules are the rules the PTA adopts to administer PTA work under the provisions of the Bylaws. Standing Rules must conform to and may not conflict with the Bylaws. They are generally not adopted when a PTA is newly organized but are developed and adopted as needs arise. The following guidelines are suggestions and should be attached to the Standing Rules for ongoing reference and instruction.

Standing Rules are more flexible than Bylaws. They do not contain parliamentary procedure. Standing Rules are kept with the Bylaws in the officers' procedure binders and are passed on to incoming officers. All Board Members and committee chairs should have a copy of the Standing Rules. The Bylaws and Standing Rules need to be studied by incoming officers and reviewed frequently for understanding and training to ensure they are still accurate and applicable. The Secretary should have a copy of the Standing Rules available at all PTA meetings.

Each set of Standing Rules is unique. No two are alike because no two PTAs are alike. Developing Standing Rules is not difficult. They may be adopted individually as the need arises. To adopt a set of Standing Rules, appoint a committee of at least three experienced, knowledgeable members of the PTA to prepare them. Using the Bylaws as a starting point, the committee should consider each provision and then formulate instructions for applying it. Use the minutes of Board and General Membership Meetings and the experience of committee members as additional resources. After the committee prepares the Standing Rules, they are presented to the Board for review and then to the General Membership for approval by an affirmative majority vote.

Standing Rules may contain as much information and detail as needed for the functioning of the PTA. The more details included, the easier the job will be for future Board Members. Standing Rules should include any specific, detailed duties and responsibilities for individual officers, Executive Committee, Board, and committee chairs. Details and descriptions that would be helpful include any consistent person, date, location, time, event, activity, assignment, tradition, and process that occurs traditionally during the PTA year.

See sample Standing Rules at LouisianaPTA.org/bylaws. Detailed information about the following additional topics and more could be included in the Standing Rules:

- Titles and specific duties of the Vice-Presidents
- Orientation of new Board Members
- Procedure binders
- Meetings
- Details for standing and special committees, which might include finance, membership, newsletter, volunteers, programs, legislation, Reflections, etc.
- Committee duties, who serves on them, and how committee members are determined
- Procedure for submitting an annual Plan of Work
- Needs assessment and annual evaluation
- Student involvement
- Fiscal policies and procedures, including location of bank and updating signatories and debit cards
- Nominating Committee instructions
- Installation of new officers
- Requirements for special recognitions and awards
- Equipment the PTA owns and where it is located
- LAPTA annual meeting and who attends
- Procedure for doing an annual Strategic Plan

2024–25 PTA Leader



Section 11: Awards, Grants, & Contests

LouisianaPTA.org/awards

LouisianaPTA.org/grants

LouisianaPTA.org/contests



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LAPTA AWARDS, GRANTS, & CONTESTS SUMMARY

Membership Awards:

August Welcome Back, Yall Award
September Jazz Up Award
October Swamp Monster Award
November Harvest Award
December wONEderland Award
January 2025 Kick Off Award
February Happy Birthday, PTA Award
March Krewe of Membership Award
All Star Award
Membership Matters Award
Golden Apple Award
Golden Magnolia Award

Contests and Reflections:

Fire Safety Poster Contest
Reflections Theme Contest
Reflections Program

Grants from LAPTA:

\$750 Literacy Grants
\$750 Healthy Minds Grants
\$500 Day of Service Grants
\$500 Creative Teacher Grants
\$500 New PTA Start Up Grants

LAPTA Awards:

LAPTA Advocacy Award for PTAs
LAPTA Advocacy Award for Students
LAPTA Joseph F. Seeley Volunteer of the Year Award
LAPTA Outstanding Newsletter Award
LAPTA Mentor-a-PTA Award

MONTHLY MEMBERSHIP CHALLENGES

LAPTA has a goal of 10,102 members for our 102nd year in 2024–25 and we need the support of the Local PTA Units to help reach that goal! To be eligible for awards, all PTAs must have Active Affiliation status. A PTA can strategically submit dues to qualify for more awards. The qualifying PTA units will receive recognition and automatically be entered into a **monthly drawing for \$100!**

August Welcome Back, Yall Award

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

September Jazz Award

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

October Swamp Monster Award

Don't let the Rougarou get you before submitting 31 New members by October 31.

November Harvest Award

Harvest 50 new members and file Active Affiliation Report with LAPTA by November 30.

December wONEderland Award

Achieve 100% of previous year's membership by December 31.

January 2025 Kick Off Award

Kick off the new year by submitting dues for 25 new members by January 31.

February Happy Birthday, PTA Award

Celebrate National PTA's birthday on February 17 by adding 17 new members by February 28.

March Krewe of Membership Award

Throw us a dozen new members by March 31.

ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 10,102 members for our 102nd year in 2024–25 and we need our Local PTA Units to help reach that goal! Qualification for awards is done without application. LAPTA uses the information on the top of the Excel Local PTA Unit Membership Report emailed to office@LouisianaPTA.org by March 31. Active Affiliation is required. The annual membership awards are announced in April.

Challenge Champ Award

Earn five or more Monthly Membership Challenges

Golden Apple Award

100% membership of teachers and administrators

Membership Matters Award

Increase membership by 10% over the previous year

Golden Magnolia Award

Membership of at least 100% of student enrollment

All Star PTA Award

Reach the LAPTA membership goal at least three consecutive years.



FIRE SAFETY POSTER CONTEST

Deadline to submit to LAPTA: October 18, 2024
LAPTA Winners Announced: October 25, 2024

Submit Entries: LouisianaPTA.org/contests
Quantity Offered: Six/Grade Category



National Fire Prevention Week is October 6-12, 2024. LAPTA is doing a Safety Poster Contest where students can draw and color a Fire Safety Poster on regular 8½ X 11 white paper. The contest is open to Pre-K through Grade 6, plus Accessible Arts Category (Students of all ages with an ADA Section 504.) The 2024 theme is posted at nfpa.org/FPW by late June. LAPTA will update this information as soon as it is released at LouisianaPTA.org/contests. Look for a welcome video from the LA Fire Marshal's Office, too, that can be shared with students!

The Local PTA decides how the contest will be organized and its deadline to receive submissions. The PTA could choose to have the teachers do the contest in their classrooms, an art teacher could organize it, or it could be done at home by the students. Provide ample notice. Provide plain paper for students, or they could even draw on the back of the flyer. Check out nfpa.org/FPW for fire safety messages, activities, materials, games and apps, lesson plans, safety tip sheet, and more. Consider scheduling a fire prevention demonstration by your local fire department. Adjust your deadlines appropriately to be able to **submit winners to LAPTA by October 18, 2024.**

Deadline to submit Safety Posters to Louisiana PTA is **Friday, October 18, 2024.**
The Louisiana Fire Marshal Chief Bryan Adams will be the guest judge for LAPTA!
Louisiana PTA will announce its winners on **Friday, October 25, 2024.**

Louisiana PTA will award three Awards of Merit winners and three Awards of Excellence winners per Grade Category. The Grade Categories are Primary (Pre-K - Grade 2), Intermediate (Grades 3-6) and Accessible Arts Category (students of all ages with an ADA Section 504). LAPTA Winners will be announced on October 25, 2024.

How to Submit Local PTA Winners to LAPTA

1. When advertising the contest, make sure each student has a Media Release on file. The information needed for each winner is the PTA name, Grade Category, student name, grade, and parental name, email, and phone number. Include the theme to help students develop their idea. A good deadline for the Local PTA is October 14, 2024, although adjust as needed.
2. The Local PTA picks three winners per Grade Category to submit to LAPTA for consideration. Some PTAs will have more than one Grade Category. Ensure that all winners have signed a Media Release Form with the school and parent's name, email, and phone number. **Take a picture of the winning posters in good lighting from directly above the picture. Be careful to include all edges and corners of the drawing in the picture.**
3. Go to LouisianaPTA.org/contests or scan the QR Code. Complete the form and upload the image for each individual poster by October 18, 2024. Information you will need is PTA name, Grade Category, student name, grade, and parental name, email, and phone number. Upload images of each winning drawing.
4. The guest judge for the LAPTA entries will be Chief Bryan Adams who is the Louisiana Fire Marshal! Winners will be announced on October 25, 2024.



2026–27 REFLECTIONS THEME SEARCH

Deadline: November 18, 2024
Winners Announced: December 2, 2024

Submit Entries: LouisianaPTA.org/contests

The only thing you need to do is share the below image!

The search is on for a future Reflections theme! National PTA's Reflections art program helps students explore their own thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning which helps them become more successful in school and in life. Each year, over 300,000 students in Pre-K through Grade 12 create original works of art in response to a student-selected theme. With this theme, students will create works of art in six categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, and Visual Arts.

Help National PTA pick the theme that will spark fun and creativity for a future Reflections program! The student who submits the final winning entry for National PTA will receive a \$100 prize. We're looking for the most original theme ideas. This means past themes and duplicate submissions will not be considered. The past list of themes can be found at the bottom of the submission form page linked below.

The current Reflections Theme for 2024–25 is *Accepting Imperfection* by Paige Opaska from Barbara Bush Middle School PTA in Texas!

To participate, students go to LouisianaPTA.org/contests and find the Reflections Theme Search link to submit their entry directly with Louisiana PTA. They should check out the past winning themes at the bottom of the entry portal to make sure they do not duplicate past themes.

The only thing the Local PTA needs to do is share this image!

Download at LouisianaPTA.org/reflections and share digitally or as a flyer to students who directly submit their entries to LAPTA. There's no further work for the Local PTA!



**NATIONAL PTA®
REFLECTIONS®**

CALL FOR NEW THEME!

**The new theme is needed
for 2026-2027!**

Help us pick the theme idea
that will spark fun and creativity for the
National PTA Reflections Program.

Deadline: November 18, 2024

| | | | | | |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
| DANCE CHOREOGRAPHY | FILM PRODUCTION | LITERATURE | MUSIC COMPOSITION | PHOTOGRAPHY | VISUAL ARTS |

**Enter your idea at:
LouisianaPTA.org/contests
and click Reflections Theme Entry
or scan me!**



REFLECTIONS PROGRAM

Deadline: January 19, 2025

Winners Announced: March 3, 2025

National PTA has a long-standing commitment to arts education. The Reflections program provides opportunities for recognition and access to the arts, which boosts student confidence and success in the arts and in life. Each year, over 300,000 students in Pre-K through Grade 12 create original works of art. This 50+ year old program helps them explore their own thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning that will help them become more successful. The 2024–25 Reflections theme is *Accepting Imperfection*, a theme that “allows students room to show vulnerability, a willingness to address failure and move on, promotes empathy and a pro-mental health mindset.”

Local PTA Units first register their unit at LouisianaPTA.org/reflections. The PTA chooses which of the six art categories their students will compete in. Students submit their completed works in one or all of the available categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, Visual Arts.

Students must participate in their Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12), or Accessible Arts (students of all ages with an ADA Section 504). Students with the ADA Section 504 may enter in the Accessible Arts Division or the grade division most closely aligned to their functional abilities.

The Local PTA Unit submits their winners to LAPTA by January 19, 2025. Please set your deadlines earlier to give yourself enough time to pick your winners. All winners are submitted through an online portal. Local Units must have Active Affiliation for their students to participate.

Reflections Guidelines and Deadlines

- Local PTA Units first [pre-register with National PTA](#) to provide National PTA information on the number of Local PTA Units planning to participate.
- **REQUIRED:** Go to LouisianaPTA.org/reflections to register with LAPTA and for all details, support documentation, and links.
- The Student Entry Portal link will be shared in the fall. This is the platform LAPTA uses to accept entries.
- Zoom training and written guidance will be provided by LAPTA.
- LAPTA accepts entries in all six Arts Categories. The Local PTA Unit can decide which Arts Categories their students can enter.
- Eligible Local PTA Units can submit three entries from each Arts Category per Grade Category to LAPTA for judging at the state level. If your school has more than one Grade Category, you may submit three entries for each Grade Category. The Grade Categories are Primary (Pre-K to Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12), and Accessible Arts (all students with an ADA Section 504).
- **ENTRY DEADLINE to LAPTA is January 19, 2025**, through the online Student Entry Portal.
- There will be six LAPTA state winners per Grade Category per Arts Category announced on **March 3, 2025**. LAPTA will celebrate the winners in April 2025!
- All information and forms are available at LouisianaPTA.org/reflections.
- Questions? Email Arts@LouisianaPTA.org.

LAPTA OUTSTANDING PTA NEWSLETTER AWARD

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025



Apply at LouisianaPTA.org/awards
Quantity Offered: 3

Louisiana PTA encourages all units to communicate with their members and community in some form whether it be a printed newsletter, electronic newsletter, or email blast. A newsletter is a great way to exchange news and ideas to bring PTA members closer to each other, to the school, and to all levels of PTA. Communicating information is a vital part of our personal and professional lives, and newsletters play a major role in that process.

Newsletters should be distributed to the entire school population by electronic communication, mail, or sent home with students. PTA membership should never determine if someone receives a newsletter. The name of the communication must identify that it is published by the PTA. The nameplate helps identify the newsletter, communicate its purpose, and invite recipients to read it. Keep the newsletter interesting, accurate, timely, and easy to read. Get an editor who is organized and diligent with excellent writing skills. There is no better way to get a parent to read a newsletter than by including their child's name in it!

Judge's Rubric (130 Possible Points)

- **General Design (25 points possible):** Frequency (5 pts); simple, easy to read, clear copy, well-spaced (5 pts); accurate and timely (5 pts); interesting to students and parents (5 pts); attractive layout and space utilized for PTA needs (5 pts)
- **Regular Articles (50 points possible):** President's monthly message (10 pts); Principal's monthly message (5 pts); monthly calendar of events (5 pts); other PTA news like programs, progress or reports of current PTA events and officers (10 pts); school news like messages from superintendent, school board members, and counselors, and events such as athletics, clubs, meetings, and assemblies (10 pts); National and Louisiana PTA news (10 pts)
- **Special Feature Articles (40 points possible):** Classroom or school projects (5 pts); educational workshops for Parents/Students (5 pts); parent education articles (5 pts); special events/workshops (5 pts); student/teacher recognition (5 pts); volunteer recognition (5 pts); State/National PTA Convention (5 pts); news from other advocacy groups and individuals (5 pts)
- **Extra Credit (15 points possible):** Student photos or drawings (5 pts); table of contents (5 pts); positive features not covered in above areas (5 pts)

To Apply for the Award

1. Collect all publications from July 1, 2024, through March 31, 2025, in chronological order and combine them into one PDF. Double check that the resolution and quality is high. A minimum of three publications is required. Only PTA newsletters or emails may be entered. See the Judge's Rubric for content ideas.
2. Go to LouisianaPTA.org/awards. Complete the information and upload the document to the Outstanding PTA Newsletter Award Application. The information needed is PTA Name, LUR#, school name and address, contact's information, editor's name, and total publications submitted. Winners will be announced on April 14, 2025.
3. Submit application by March 31, 2025, at LouisianaPTA.org/awards.

LAPTA ADVOCACY AWARD FOR A PTA

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025



Apply at LouisianaPTA.org/awards
Quantity Offered: 2

The LAPTA Advocacy Award is available for up to two Local PTA Units. The purpose of the Advocacy Award is to recognize a PTA Unit who has worked to make a change for the betterment of children. Advocacy is the heart of PTA and should be the priority of all. Every PTA should have a year's worth of advocacy that they could submit!

There are a multitude of ways PTAs or students can advocate to make all children's potential a reality. See the LAPTA Toolkit Section 7: Advocacy for insights and suggestions.

Entry information includes Local PTA Name, LUR#, parish, PTA contact, PTA position, PTA budget totals, and documentation of the advocacy work. Describe the advocacy work. Who was involved? What was the initial plan? Did the plan change over time and how? Was the work publicized and to whom? What impact did the advocacy work have on children or who was the beneficiary of the work? Be as thorough and descriptive of the advocacy work as possible, which can be more than one project, event, or item. The format can be PDF, Word file, pictures in any format, etc. All applications will be reviewed blindly by the LAPTA Board of Directors.

Submit application by March 31, 2025, at form.jotform.com/221794928286067 or scan the QR Code.

LAPTA ADVOCACY AWARD FOR A STUDENT

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025



Apply at LouisianaPTA.org/awards
Quantity Offered: 2

The LAPTA Advocacy Award is available for up to two Louisiana students who are in high school or younger. The purpose of the Advocacy Award is to recognize a student who has worked to make a change for the betterment of children. Advocacy is the heart of PTA and should be the priority of all. It's never too soon for students to get involved in advocacy work!

There are a multitude of ways students can advocate to help achieve PTA's mission which is to make all children's potential a reality. See the LAPTA Toolkit Section 7: Advocacy for insights and suggestions.

Entry information includes the student's contact information and school, parental consent, the PTA name that they are a member of, PTA's parish, detailed and complete documentation of the advocacy work, and two letters of recommendation. Describe the advocacy work. Who was involved? What was the initial plan? Did the plan change over time and how? Was the work publicized and to whom? What impact did the advocacy work have on children or who was the beneficiary of the work? Be as thorough and descriptive of the advocacy work as possible, which can be more than one project, event, or item. The format can be PDF, Word file, pictures in any format, etc. All applications will be reviewed blindly by the LAPTA Board of Directors.

Submit application by March 31, 2025, at form.jotform.com/221794928286067 or scan the QR Code.

LAPTA “JOSEPH F. SEELEY” VOLUNTEER OF THE YEAR AWARD

Application Deadline: March 31, 2025
Winner Announced: April 14, 2025



Apply at LouisianaPTA.org/awards
Quantity Offered: 1

The volunteers across Louisiana are truly the heart of the association. Recognize and thank that special person who goes above and beyond for all children, the one who acts as a tireless advocate for children’s education, health, and well-being by honoring them with a Volunteer of the Year Award. This award recognizes one PTA volunteer who made a positive impact on the school and its children. This special person does not need to be the person who logs the most volunteer hours or is a PTA Executive Committee member. Letters of recommendation are not required but will be accepted and considered if submitted.

LAPTA's volunteer recognition award was established in 2023 to honor the memory of Joseph Francis Seeley, a consummate volunteer. His enthusiasm and dedication to all he served never waned. Joseph served as a compelling force in bringing awareness to the power of volunteering.

Recognize the very best! Think of the people the PTA might like to honor with a Volunteer of the Year Award, people who care about children and have spent their lives caring about and devoted to the service of children and youth, perhaps a PTA leader, past or present, the quiet, reliable, unassuming volunteer, an outstanding teacher who might be retiring, a senior citizen who serves as a volunteer in the school, a school crossing guard who ensures the children get to school safely for years, a police officer or juvenile protection worker, or a legislator who has worked for laws benefiting children.

Grant Questions:

1. What makes the accomplishments of this nominee more significant than all other volunteers?
2. Describe the nominee’s innovative or unique approach in performing volunteer service.
3. Describe how the nominee mobilized other volunteers or generated increased resources.
4. Describe the nominee’s ongoing involvement rather than one-time activity.
5. How many years has the nominee volunteered for PTA?
6. Upload a picture of the nominee and the optional letters of recommendation.

Other needed information is PTA name, LUR#, and contact name, nominee’s contact information, and a picture of the nominee while volunteering, advocating, or doing PTA work.

Submit application by March 31, 2025. Scan the QR Code or go to LouisianaPTA.org/awards.

MENTOR-A-PTA AWARD

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025



Apply at LouisianaPTA.org/awards
Quantity Offered: 2

LAPTA offers a Mentor-a-PTA Program where a strong, healthy PTA mentors a smaller, protected, or new PTA unit (Mentee) who needs a helping hand. As we are all part of Louisiana, the success of one is the success of all. How can you reach out to others in your community and state? The focus of this program is to mentor through guidance, planning ideas, monthly check-in, and leadership support. Mentors are upbeat, positive advocates who provide tools and direction to the Mentee PTA. If there is a financial contribution, then it must be approved by the General Membership and included in the annual budget. Give the members ownership in the philanthropic work of the PTA. Other non-financial support does not need approval, but always let the membership know the good work done behind the scenes.

Award Application

The Mentor-a-PTA Award recognizes philanthropic work from one PTA to another PTA. The information needed is the PTA name and city, contact person’s name, phone, and email, and a **good description of the philanthropic work** done by the nominated PTA.

Submit application by March 31, 2025. Scan the QR Code or go to LouisianaPTA.org/awards.

NATIONAL PTA GRANTS

National PTA offers over 500 grant opportunities annually. Share with LAPTA any grants that the PTA receives so that the accomplishments can be celebrated! If you don't receive a grant the first time, apply again. Visit PTA.org, go under the *Run Your PTA* menu, and select *Award & Grant Opportunities* for more information. The deadline is usually in early Fall.

LOUISIANA PTA GRANTS

Louisiana PTA financially supports Local PTA Units that work tirelessly to help establish strong family-school partnerships in their community. LAPTA gives up to \$12,000 in grants to help engage families, support student success, improve the health and safety of students and families, increase arts education, and more. In addition to evaluating the merits of each application, we may also consider geographic and financial needs and other criteria to ensure a robust and diverse pool of grantees. To apply, see instructions for each application later in this section.

TOP GRANT WRITING TIPS

For many organizations, grant writing is the most important component of their fundraising strategy. When trying to secure funding for a nonprofit, it is important to learn how to write a strong, successful proposal. The best grant proposals are clear, organized documents that illustrate why the PTA should receive funds from the grantor.

First and foremost, know the audience by getting to know the institution offering the grant. Consider its goals, values, and objectives. Understanding these elements helps to demonstrate how and why the PTA is a good fit. Research the eligibility expectations for each specific grantor and meet the minimum requirements. Compile a list of testimonials, recommendations, data sets, and success stories to include with the application. Every grantor is different, but they all want to know their money is being used wisely.



- **Know What Grants Exist and When to Apply.** Sign up for National PTA's newsletters at PTA.org/SignUp and bookmark the grants page at PTA.org/Grants.



- **Tell a Compelling Story.** Make sure all answers work together to highlight the PTA's strengths and mission or the reason why the PTA exists.



- **Share How the Grant Would Impact the School Community.** Identify an existing need in the school community and explain how the grant will address that need.



- **Show Enthusiasm.** Say how the grant will provide an exciting opportunity for the school and PTA.



- **Answer All Parts of the Question.** Include concrete, detailed examples and explanations that expressly answer the questions asked.



- **Promote Family Engagement.** Demonstrate how this grant will help to build stronger families in the community and encourage all families to attend the event.



- **Get a Second Set of Eyes.** Ask someone to proofread the proposal for spelling, grammar, and clarity before submitting the application.

Peek, Sean. "[How to Write a Grant Application for Your Organization.](#)" *USChamber.com*, February 5, 2021.

\$750 LAPTA LITERACY GRANT APPLICATION

Application Deadline: November 22, 2024
Winners Announced: December 2, 2024

Apply at LouisianaPTA.org/grants
Quantity Offered: 4 (One/category)

The LAPTA \$750 Literacy Grant 750 helps Local PTA Units host literacy programs or purchase literary items for the school library or a teacher's classroom library. Literacy skills in Louisiana are unacceptably low, and LAPTA and National PTA are making literacy opportunities a priority for our children. For program suggestions, see PTA.org/home/programs/family-reading. One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply.

Entry information includes Local PTA Name, LUR#, parish, mailing address, the Grade Category, PTA's gross annual income, and PTA contact's name, email, phone, and PTA position.

Requirements

- All grant funds must support age-appropriate programs for literacy skills.
- The program ideally should serve a majority of the school population.
- The funds will be used by May 23, 2025.
- Documentation of the spent funds must be emailed to Contests@LouisianaPTA.org by May 23, 2025.

Questions

1. Describe how the PTA plans to spend the funds to increase literacy for their students. Include the purchased items, goals, supplies, volunteers needed, and any other details.
2. What are the top three literacy challenges for the children in the community?
3. If the school has a library, what is the name of the school librarian?
4. How will the program be publicized to parents, families, and the community before and after the event?
5. What is the PTA's gross income for the year?

The above PTA fully understands that if it receives this grant, the money shall only be used for activities listed on the application. A written evaluation of the efforts is due to Contests@LouisianaPTA.org by May 23, 2025. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility for future grants.



Applications must be submitted online at LouisianaPTA.org/grants or scan the QR Code.



\$750 LAPTA HEALTHY MINDS GRANT APPLICATION

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025

Apply at LouisianaPTA.org/grants
Quantity Offered: 4 (One/category)

The LAPTA Healthy Minds Grants encourage Local PTA Units to host mental health activities, events, or programs at their supported schools. It is important to support the mental health of all children before, during and after challenges arise and to support parents' and caregivers' mental health, too! National PTA developed the PTA Healthy Minds Program to empower families to make mental health an everyday priority.

National PTA has a 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 is an officer for Judson Warriors PTA in Shreveport, LA. She will be empowering families with resources and tools to help them make mental health a daily priority! Follow her and learn more at PTA.org/HealthyMinds, search "Louisiana PTA Healthy Minds" on Facebook, or email Jessica at healthyminds@LouisianaPTA.org.

One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12).

Entry information includes Local PTA Name, LUR#, parish, mailing address, the Grade Category, PTA's annual gross income, and PTA contact's name, email, phone, and PTA position.

Requirements

- All grant funds must support an age-appropriate mental health activity, event, or program.
- The program should ideally serve a majority of the school population.
- The program will occur by December 31, 2025.
- Documentation of the program must be emailed to Contests@LouisianaPTA.org by December 31, 2025.

Questions

1. What is the name of the school counselor or Mental Health Provider (MHP)?
2. What are the top three challenges for the MHP?
3. Describe the mental health program, event, or activity the PTA wants to host for their students. Include the goals, supplies, volunteers needed, and any other details.
4. What are the top three mental health challenges for children in the community?
5. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to Contests@LouisianaPTA.org by December 31, 2025, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at LouisianaPTA.org/grants or scan the QR Code.



\$500 LAPTA DAY OF SERVICE GRANT APPLICATION

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025

Apply at LouisianaPTA.org/grants
Quantity Offered: 4 (One/category)

The four LAPTA Day of Service Grants encourage Local PTA Units to reach beyond the school and into the community to make a difference. Where is there a need? Who needs the PTA? February 17 is the National PTA Founders' Day. How can you continue the rich legacy of National PTA? Perhaps you could partner with other aligned nonprofits or agencies who serve populations like foster kids, food insecurity programs, the elderly, a community library, or an animal shelter. One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply online.

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

Requirements

- All grant funds must support a community outreach program.
- The school families must support the program.
- The program will occur by December 31, 2025.
- Documentation of the implemented program must be emailed to Contests@LouisianaPTA.org by December 31, 2025.

Questions

1. What are the top three community goals for the school's administration?
2. Describe the community outreach or day of service program the PTA wants to host. Include the location, goals of the event(s), supplies, volunteers needed, and any other details.
3. What are the top three challenges for the group, nonprofit, or agency that you are trying to support?
4. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to Contests@LouisianaPTA.org by December 31, 2025, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at LouisianaPTA.org/grants or scan the QR Code.



\$500 LAPTA CREATIVE TEACHER GRANT

Application Deadline: March 31, 2025
Winners Announced: April 14, 2025

Apply at LouisianaPTA.org/grants
Quantity Offered: 4

LAPTA offers Creative Teacher Grants to classroom teachers to fund creative, innovative, and fun programs or projects for students. Grants may fund instructional and classroom materials, videos, parent involvement programs, or any activity or material which supports student enjoyment, wonder, and engagement. The hope is that this grant will result in fun and enriching projects or opportunities for the students that would not otherwise have been possible.

The proposal shall be clear and logical and include a specific objective; a creative or innovative approach; clear description of instructional procedures, methods, or treatments; and emphasis on student enjoyment, wonder, and excitement. The teacher or group of teachers must be current PTA members at their school. Funds must be used by December 31, 2025.

The information needed for the online application is contact information, applicants who are current PTA members at their school, and name of proposed project, including:

1. What will the project accomplish?
2. Which and how many students will the project serve?
3. How will the project specifically benefit the students?
4. What is fun, creative, and innovative about the project?
5. What are the complete details of the project?
6. How will the project be publicized to parents, families, and the community before and after the project?
7. Further support documentation or video uploads may be included to improve the application.

The applicant fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to Contests@LouisianaPTA.org by December 31, 2025, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at LouisianaPTA.org/grants or scan the QR Code.

