

RETENTION FACT SHEET

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes ten items which are detailed later in this section. Email the complete report by **October 28, 2022** to afiles@LouisianaPTA.org. Local PTAs that do not maintain Active Affiliation will be subject to the Retention Plan. Information on the Active Affiliation Report is available at LouisianaPTA.org under Run Your PTA menu.

WHAT IS THE RETENTION PLAN?

If a Local Unit fails to submit the Active Affiliation Packet (the yearly requirements to maintain its IRS status and PTA affiliation) then the Retention Plan is initiated by LAPTA. The Retention Plan assists units in returning to an Active Affiliation status. The goal of the LAPTA Retention Plan is to support Local Units and to make the process as easy as possible. LAPTA recognizes that some PTA’s unit leadership might inherit a PTA not in compliance and are usually not familiar with the requirements of Active Affiliation themselves. Communication is key. Local Units will not be “in trouble” or scolded, but rather LAPTA welcomes the efforts and is eager to get Local Units back in the fold.

Local PTA Retention Plan is initiated when a Local PTA does not maintain Active Affiliation. When a Local Unit fails to submit the yearly requirements Active Affiliation status, then LAPTA has the “Retention Plan” to get units back on track and to make the process as easy as possible. LAPTA recognizes that some PTAs might inherit a PTA not in compliance. Communication with LAPTA is key. Local Units will not be “in trouble” or scolded, but rather LAPTA welcomes their efforts and is eager to get Local Units back to Active Affiliation status.

RETENTION PLAN STEPS

- 1. Notification:** After the deadline passes to file the Active Affiliation Packet, LAPTA will notify the PTA of the actions required to obtain Active Affiliation Standing. The PTA will have 30 days, from the date of the notification, to meet all requirements to avoid moving into the Restriction Phase.
- 2. Restriction:** After 30 days without proper submission, the PTA has a second 30-day period to submit the report and are additionally not eligible for awards, programs, or grants administered by LAPTA or National PTA.
- 3. Intervention:** After 60 days without proper submission, LAPTA assigns a support team and implements the Plan of Action with its final deadline. *See Plan of Action Form at the end of this section.*
- 4. Dissolution:** A Local Unit is considered for revocation of their charter and loss of their LAPTA associated IRS 501(c)(3) nonprofit status under any of these circumstances: the Local Unit leadership refuses to implement a Plan of Action when placed in the Restructure Phase; or the Local Unit is not in compliance with the Purposes and Principles of PTA as defined in the Local Units Bylaws Template, adopted May 2022, Articles II and III; or Active Affiliation is not acquired for three consecutive years. The Local PTA must cease and desist further use of the PTA name when the charter and IRS non-profit status are revoked. Bank and online accounts must be closed with any remaining funds donated to LAPTA or another PTA.



ACTIVE AFFILIATION: PLAN OF ACTION

For Local Units in the Restructure or Reactivation Phase, contact LAPTA at afiles@LouisianaPTA.org to discuss your situation. Complete the Plan of Action Form to work toward Active Affiliation status. After speaking with LAPTA, note the new deadline for each item. Fill in the submission date when the item is emailed to LAPTA.

Local Unit Name	Parish	Local Unit LUR#	Date
-----------------	--------	-----------------	------

CHOOSE all incomplete items. Note the date for each item after speaking with LAPTA officer.

Active Affiliation Cover Page was not completed.
 New deadline: _____ Emailed to LAPTA Date: _____

A minimum of 30 LAPTA membership dues was not submitted.
 New deadline: _____ Emailed to LAPTA Date: _____

Board data was not submitted to LAPTA at LouisianaPTA.org/submit-officer-data-1.
 New deadline: _____ Emailed to LAPTA Date: _____

Bylaws are outdated.
 New deadline: _____ Emailed to LAPTA Date: _____

IRS taxes were not filed.
 New deadline: _____ Emailed to LAPTA Date: _____

Local Budget Approval Form with the Approved Budget was not filed.
 New deadline: _____ Emailed to LAPTA Date: _____

Audit Committee Report was not filed.
 New deadline: _____ Emailed to LAPTA Date: _____

Active Articles of Incorporation with LA Secretary of State were not filed.
 New deadline: _____ Emailed to LAPTA Date: _____

Proof of PTA Leadership Training for all elected officers was not filed.
 New deadline: _____ Emailed to LAPTA Date: _____

When submitting the above items, include this Plan of Action form.

I, the authorized representative of the Local PTA Unit, hereby agree to the above Plan of Action to acquiring Active Affiliation.

Local Unit President's Signature	Date	Local Unit President's Name
----------------------------------	------	-----------------------------

President's Email	President's Phone
-------------------	-------------------

LAPTA Officer's Name

Email the completed form to afiles@LouisianaPTA.org.