

LAPTA ToolKit

2022 - 2023



President

2022 – 2023

Section 2

INDEX

<u>About National PTA</u>	3
<u>Leadership Traits</u>	4
<u>Important Documents and Terms</u>	4
<u>Essential Knowledge</u>	5
<u>Important Dates and Deadlines</u>	6
<u>Getting Started</u>	8
<u>Building Your Board of Directors</u>	9
<u>Pick Your PTA Programs</u>	10
<u>PTA Leadership Training</u>	10
<u>Finances</u>	11
<u>CheddarUp.com and MoneyMinder.com</u>	12
<u>Communications and Social Media</u>	13
<u>Membership</u>	15
<u>LAPTA Centennial Button Pins for Members</u>	15
<u>Customize the PTA Logo</u>	15
<u>Meeting Types</u>	15
<u>Elements of Successful Meetings</u>	16
<u>Agendas</u>	17
<u>Parliamentary Law</u>	18
<u>Problem Solving</u>	19
<u>President’s Duties Checklist</u>	20
<u>Dos and Don’ts of Partnering with Administrators</u>	22
<u>Dos and Don’ts of Partnering with Teachers</u>	23
<u>President’s Binder</u>	24
<u>Sample Passwords and Accounts Summary</u>	24
<u>Fundraising Strategies</u>	25
<u>Year-End Checklist and Transition Guidance</u>	26
<u>Inventory Accountability Form</u>	27
<u>What is Active Affiliation?</u>	28
<u>Retention Plan</u>	28
<u>Reactivation Phase</u>	28
<u>Active Affiliation Report</u>	29
<u>Active Affiliation: Plan of Action</u>	30
<u>Icebreakers</u>	31
<u>Sample Agenda</u>	32
<u>Sample Meeting Script</u>	33
<u>Confidentiality, Ethics, and Conflict of Interest Policy</u>	37



ABOUT NATIONAL PTA

The Local PTA Unit is a member of the Louisiana PTA (LAPTA) and National PTA organizations, maintains the requirements for active affiliation, and shares the mission, purposes, values, and standards of National PTA. Find more information at LouisianaPTA.org and PTA.org.

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

Purposes

- 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;
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.



Values

- **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

- 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.

LEADERSHIP TRAITS

Successful leaders are effective leaders. Their skills and abilities allow them to step into a variety of roles, and they see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to continually improve. As President, you are a leader.

The following are competencies effective leaders demonstrate and use to make every child's potential a reality.

- **Self-Awareness** – Has the ability to assess their own strengths and weaknesses
- **Vision** – Demonstrates a clear understanding of the future and how to get there
- **Relationship Building** – Develops trust and mutual respect, and values diversity
- **Critical Thinking** – Obtains all the relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
- **Time & Resource Management** – Effectively prioritizes and manages resources to accomplish goals
- **Motivation** – Demonstrates and promotes interest and enthusiasm
- **Empathy** – Recognizes verbal and nonverbal feelings, needs, and concerns of others
- **Creativity** – Sees and thinks of innovative ideas, alternatives, and ways to do things
- **Communication** – Listens actively and conveys information clearly, concisely, and accurately in both writing and speech
- **Collaboration** – Works with a team to achieve a common purpose; puts service before self
- **Delegation** – Shares responsibilities including guidance and follow up, fostering leadership in others
- **Continuous Learning** – Pursues development of skills and knowledge
- **Integrity** – Does the right thing when no one is watching
- **Initiative** – Steps up unprompted, going above and beyond with excellence

IMPORTANT DOCUMENTS AND TERMS

Local PTAs fall under Louisiana PTA tax umbrella and are classified as **tax-exempt 501(c)(3) nonprofits** under the US Internal Revenue Code. LAPTA has procedures to help protect Local PTA Units from violating the restrictions that apply to the 501(c)(3) classification. *For more information, please review the LAPTA Toolkit: Treasurer.*



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 a PTA is a unit of the Louisiana PTA.

Bylaws provide the rules for the association (or PTA). They describe the rights and duties of the members. They are the backbone of the PTA. All Local PTA Units are required to have their Bylaws approved by LAPTA which is responsible for ensuring that unit Bylaws follow LAPTA and National PTA Bylaws. Annual review of the Bylaws ensures that they reflect the way the PTA functions. LAPTA rules require units to review their Bylaws, update them if needed, and submit them to the LAPTA for approval at least once every three years. It is important to keep your Bylaws current and to refer to them often.

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 non-profit organization. The President may contact LAPTA if they do not know their EIN. If a PTA needs to verify its non-profit status and EIN number such as when applying for a grant or opening a bank account, contact LAPTA President to request an EIN letter.

Local Unit Registration Number (LUR #) is issued to each Local PTA Unit when the charter began. It is also known as a National PTA ID#. This number never changes. It is found on any material received from National PTA. This number is important and should be kept with your permanent records.

ESSENTIAL KNOWLEDGE

The President serves as the presiding officer of the Local PTA Unit and presides over the Board of Directors and General Membership meetings. It is the President's responsibility to be well prepared. The President distributes all materials to the appropriate officer or committee chair and is the link to the principal. The President directs the affairs of the association in cooperation with the other members of the Board. The term begins and ends at the opening and closing of the fiscal year, as specified in the Bylaws, usually July 1 – June 30. Participation and cooperation from officers, committee chairs, and members will determine the success of the administration.

The Local PTA Unit and its members are a part of Louisiana PTA (LAPTA) and National PTA. Members are the backbone of the association. Membership does not consist of mere numbers. Strive to build an informed team of individuals working on behalf of all children. A membership involved in the school and community builds the foundation for its children and generations to come. A membership that reaches beyond the parents and teachers and looks out into the community will open its doors to many opportunities. By extending membership, its voice becomes stronger so that policymakers on all levels will hear a strong, unified voice for all children.

Planning and promoting PTA programs and events is a primary responsibility in PTA. It is the avenue to achieving our goals as child advocates and supporters of public education. PTA programs serve as a tool to educate the membership and to draw the members into a community of support for the children and families served by PTA. Programs today are creative and meaningful. PTA is unique in that it offers a way for families of differing religions, cultures, economic groups, and political interests to unite in support of one common issue: the health and welfare of children. No other organization exists to serve this function so completely.

PTA programs keep the membership informed of issues, educate parents, and provide a sense of community that unites neighbors far beyond involvement in their children's school. Family engagement results in higher student achievement and closer family-school ties. *See Pick Your PTA Programs later in this section.*

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 elections and leadership on local Boards of Education is of 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 participate in, initiate, or sponsor a public meeting for this purpose. Invite all community groups to send representatives to the meeting to thoroughly discuss the qualifications of each candidate. All candidates must be asked to speak to avoid even the appearance of partisanship or discrimination. *See LAPTA Toolkit: Advocacy* for more details.

LAPTA IMPORTANT DATES AND DEADLINES

July 2022

- July 1 Board position terms begins
- July 15 Submit officer data at [LouisianaPTA.org/submit-officer-data-1](https://form.jotform.com/221816998285068)
- July 25 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- July 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

August 2022

- August 1 Reflections Program opens at [LouisianaPTA.org/reflections-program](https://form.jotform.com/221816998285068)
- August 12 Start working on Active Affiliation Report (<https://form.jotform.com/221816998285068>)
- August 12 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- August 20 LAPTA Leadership Training South for southern Local PTA Units (Mandeville, LA)**
- August 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)
- August 27 LAPTA Leadership Training North for northern Local PTA Units (Shreveport, LA)**
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2022

- September 1 Review PTA.org and LAPTA ToolKit: Awards & Grants for available grants and their deadlines
- September 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- September 21 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- September 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

October 2022

- October 1 Deadline for National PTA.org School of Excellence Submission
- October 9–16 Fire Prevention Week 100th Anniversary & Safety Poster Contest (Pre-K – 6th Grade)
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 13 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- October 18 Safety Poster Deadline to Submit Winners (<https://form.jotform.com/221746113272146>)
- October 21 LAPTA Safety Poster Winners Announced
- October 23–31 Red Ribbon Week: “Celebrate Life. Live Drug Free”
- October 28 Deadline for Active Affiliation Report** (<https://form.jotform.com/221816998285068>)
- October 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

November 2022

- November 1 Plan Family Reading Experience Event; visit [PTA.org/home/programs/family-reading](https://form.jotform.com/221748002230038)
- November 4 LAPTA Reading & Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 8 Election Day – Advocate for all children by voting
- November 10 Reflections Theme Contest Submission Deadline (<https://form.jotform.com/221745830340147>)
- November 10 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 14 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- November 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)
- November 28 LAPTA Reflections Theme Search Winners Announced

December 2022

- December 1 LAPTA Reading & Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 12 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

January 2023

- January 15 Reflections Submission Deadline to LAPTA
- January 17 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- January 20 Deadline for PTA Legislative Convention (LegCon) Grants <https://form.jotform.com/221776439055159>
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2023

- February 1 Newsletter Award Application Deadline (<https://form.jotform.com/221745628447059>)
- February 1 Advocacy Award Application Deadline at LouisianaPTA.org/grants
- February 9 Louisiana PTA's 100th Birthday
- February 9 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- February 17 National PTA Founders' Day
- February 17 LAPTA Day of Service Grant Application Deadline (<https://form.jotform.com/221748846538166>)
- February 21 Mardi Gras Day
- February 28 LAPTA National PTA Legislative Convention (LegCon) Grant Winners Announced
- February 28 Deadline for PTA Convention Grants, Volunteer of the Year Award, and Mentor-a-PTA Award
- February 28 Deadline for Love Louisiana Video Challenge (<https://form.jotform.com/221775295270157>)
- February 28 Deadline for Creative Teacher Grants (<https://form.jotform.com/221796420623152>)
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2023

- March 1 LAPTA Reflections Program Winners Announced
- March 2 Read Across America Day (nea.org)
- March 6 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- March 15 Deadline for Membership Reports for use in determining LAPTA Membership Awards
- March 24 & 25 LAPTA Centennial Celebration in Baton Rouge with Children's Recognition Ceremony**
- March 25 LAPTA General Membership Meeting; Winners of LAPTA Day of Service Grants, National PTA Virtual Convention Grants, Outstanding Newsletter Awards, Love Louisiana Video Challenge, Creative Teacher Grants, and Volunteer of the Year Winners Announced
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline (<https://form.jotform.com/221748198534162>)
- March TBA Virtual National PTA Legislative Convention (LegCon)

April 2023

- April Transition Time: Planning for the Year Ahead
- April 20 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/submit-officer-data-1

May 2023

- May Transition Time: Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 8–12 Teacher Appreciation Week
- May 15 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- May 25 Submit new membership dues at LouisianaPTA.org/membership
- May 25 Submit new officer data at LouisianaPTA.org/submit-officer-data-1

June 2023

- June 1 Search, share, and publicize Summer Learning Programs at PTA.org and your local community
- June 12 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
- June 22–25 National PTA Virtual Convention (tentative dates)
- June 25 Submit new officer data at LouisianaPTA.org/submit-officer-data-1

GETTING STARTED

Once elected as President, get organized early. Talk with the outgoing President and set a date for a formal transition of records. Ensure Board members have met with their predecessors to receive Procedure Binders and relevant information. Request and review a copy of the Bylaws from LAPTA to ensure it is the most current. Meet with the principal to discuss the calendar for the year and review campus goals and needs. Set up the personal “Presidential” work environment by creating folders on a computer and cloud storage for shared files. Also, organize a new President’s binder and file space at home. Browse LouisianaPTA.org, PTA.org, and join PTA Leader group on Facebook to connect with other PTA leaders. Follow LAPTA on Facebook.

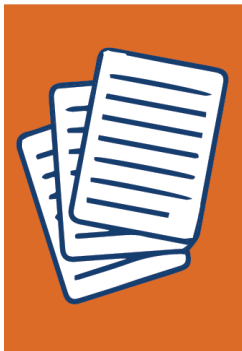
Financial Check Up

Coordinate with the new Treasurer to have the signature cards for bank accounts updated 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. Review the Bylaws to determine the number and requirements for check signers. Minutes from the election meeting are necessary to enact the change, as well as other requirements established by the bank. Facilitate, if necessary, arrangements for documents to be delivered to the Audit Committee after the fiscal year ends and in the beginning of the school year. See *LAPTA Toolkit: Treasurer* for financial details.

Starting Your PTA Work

The newly elected President should call and conduct a meeting of the newly elected officers within 30 days of the election. Have an agenda for all meetings. Appoint parliamentarian, historian (if necessary), standing committee chairs, and other open positions. Strive for a balance of experienced and new members who represents campus demographics. All Board members should submit their names and contact information at LouisianaPTA.org/submit-officer-data-1 as soon as possible each year.

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 PTA meetings, PTA special events, all PTA election dates, dates for selecting budget and nominating committees, PTA program deadlines, PTA Founders’ Day on February 17, Membership dues deadlines, membership awards deadlines, LAPTA grant deadlines, LAPTA Leadership Training, and PTA conventions.



Schedule a planning meeting for the Board. Your Board includes officers (President, Vice-President(s), Treasurer, and Secretary), the principal, parliamentarian, standing committee chairs (if specified in your Bylaws), and additional committee and chair positions such as historian, faculty representative, and student representatives (as specified in your Standing Rules). You should determine goals for the year and the PTA programs you would like to implement. Review the current Bylaws and create the Standing Rules with the entire Board. The Bylaws contain many job responsibilities, timelines, and due dates. Reviewing them together gets everyone on the same page with the same expectations. Make sure Board members know they must check with you before speaking on behalf of the PTA or before sending any correspondence. Board members are to contact the President before discussing PTA business with the principal. The Standing Rules contain the specifics on how

the PTA is organized and run. LAPTA is creating a template for your use.

See the end of this section for the *President’s Duties Checklist*. **It is also recommended that the President review all sections of the LAPTA Toolkit.**

BUILDING YOUR BOARD OF DIRECTORS

The two types of PTA committees are **standing committees** whose work is ongoing throughout the year and **special committees** whose work is a specific short-term task. The President is invited to all committee meetings. *Learn more at LAPTA Toolkit: Board of Directors.*

The number of standing committees necessary to do the work of the PTA depends on the size of the membership, programs and activities, and the interests of the community. The newly elected President calls a meeting of the newly elected officers within 30 days of the election to appoint the standing committee chairs and fill any vacancies in the officer positions, subject to the approval of the Board of Directors. Check your Standing Rules for a list of the standing committees and their duties. The committee chairs should represent a cross-section of the membership. Recruit experienced, as well as new, Board members and committee chairs.

It is not the President's job to find all the Board of Director members and committee chairs. Get recommendations from past and current Board members, principal, teachers, office staff, and the membership. PTA welcomes all people! Filling all Board positions as quickly as possible after the election meeting permits everyone to attend LAPTA training in August and allows time for planning the coming year's work. It is okay if a few Board positions remain open as this allows newcomers to get involved in the fall.

Check your Bylaws for the positions listed on your Board of Directors. Leadership potential develops, PTA interest increases, and PTA work expands when committee members are diverse, receive training materials such as LAPTA Toolkit, utilize PTA.org, become familiar with PTA Purposes, collaborate with Board members on common goals, and maintain a procedure binder. Create committees to fit the needs, programs, and projects of your Local PTA. Use only those committees that apply to your needs.

- Advocacy
- Arts in Education/Reflections
- Public Relations
- Diversity, Equity, and Inclusion
- 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
- Youth Protection

Special committees and subcommittees are used as a way of engaging more people in the work of PTA. The subcommittees are small workgroups that do the work for the committees. At least one committee member should serve on each subcommittee, usually as chair and the President is always invited to all committee meetings. Create special committees for a specific purpose. The committee automatically dissolves as soon as it accomplishes that purpose and presents the committee report, or the term of office ends.

The principal is a member of the PTA Board and, oftentimes, is the only constant in an ever-shifting leadership group. A good working relationship between the principal and a healthy PTA can lead to a great learning environment for students and families. The PTA President and the principal must communicate regularly and work together for the good of all concerned. Presidents need to remember that they are in the principal's school as a guest; however, the principal must also understand that the PTA is governed by its Bylaws, which may limit the PTA's response to some requests from the school. See *Dos and Don'ts of Partnering with Administrators* later in this section. A **teacher** may serve on the Board and a **student** may serve on the Board especially for PTSAs. See *Dos and Don'ts of Partnering with Teachers* later in this section.



To communicate effectively with the Board, use a good app such as GroupMe or Band App. Board members shall use PTA emails that are handed down from year to year and not personal emails. President, Treasurer, and Secretary shall keep a list of all passwords and recovery information.

PICK YOUR PTA PROGRAMS

The key to a successful PTA is to support the mission of PTA which is to make each child's potential a reality. **National PTA Programs** provide access to engaging, educational, and fun opportunities that inspire, recognize, and impact all students and their families. There are many programs that can help Local PTA Units make an impact in their community.



LAPTA also offers a **Mentor-a-PTA Program** that a strong, active PTA mentors a smaller, protected, or new PTA unit (Mentee) that needs a helping hand with the implementation of PTA values and goals. As we are all part of Louisiana, the success of one is the success of all. A Mentee PTA might like to sit in on a Board meeting, or perhaps see your agendas, Welcome Packet, membership forms, school flyers, and more. It is another way to reach out to others in the 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. If your PTA would like to participate as either the Mentor or the Mentee, please email President@LouisianaPTA.org. There is no deadline for this.

Here is a small list of National PTA programs. Find more information at 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 our 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.
- **Connect for Respect:** A step-by-step process for assessing the school culture and working with the entire school community to create an action plan to prevent bullying.
- **National PTA as a Grantmaker:** National PTA has grants to provide extra support to PTAs in running their programs. Learn how National PTA's grantmaking approach has evolved over the past years.

LEADERSHIP TRAINING BY LAPTA

All elected officers for Local PTA Units shall complete annual PTA Leadership Training. Proof of training is required for the Active Affiliation Packet. Other Board members are encouraged to receive training. Board members should understand the other positions and roles within the Board. Sources for training are:

- 1) **LAPTA Leadership Training Days:** In-person training is offered in southern Louisiana on August 20, 2022, and in northern Louisiana on August 27, 2022. Local units will receive registration information from LAPTA. Please make sure the new officers' information is submitted to LAPTA as soon as they are elected. LAPTA also offers one-in-one training as needed. Email President@LouisianaPTA.org.
- 2) **E-Learning from PTA.org:** Create an account. Under the *Run Your PTA* menu, select E-Learning or THRIVE. Submit a copy of the emailed completion certificate.

FINANCES

Every PTA must have a budget that is approved by its membership before it can spend money beyond the “Startup Funds” budget line item. Determining PTA goals is a key step in the budget process. The use of funds outlined in the budget should reflect those goals. After the budget has been drafted, it must be presented by the committee chair to the Board of Directors for consideration and then to the General Membership for approval. A majority vote of the members at the General Membership meeting is required for adoption. The budget is presented item by item to allow for discussions and amendment. All expenses for the PTA are disbursed in accordance with the approved budget for that year. Funds do not have to be fully spent each year.

Amending the Budget

The budget is an estimate of the planned revenue and expenses for the year. When there are additional expenses, differences in revenues, or a change in an approved expense, the budget must be amended by a vote of the General Membership at any regular meeting or at a special meeting called for that purpose. Any additional proposed expenditure or fundraising project, not provided for in the budget, must be presented to the association for approval before proceeding with the project or payment. To amend something previously adopted, it is necessary to have a two-thirds majority if no meeting notice was given or a simple majority if notice was given.

PTA Books and Records

The Treasurer is responsible for maintaining the books and records of the PTA. The books include the check book, Deposit Forms, Check Requests, the approved budget, budget reports, filing taxes, and more. Online accounting software is recommended such as MoneyMinder.com. There is no ruling from the IRS, National PTA or LAPTA that limits the amount of money that a Local PTA Unit may carry over from one year to the next. This will vary from one PTA to another. If the PTA continues to carry over large sums of money, reduce the number of fundraisers to bring revenues in line with program 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 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. A bank account may be opened for a specific future purpose, especially if the donor’s specified what their money would support.

PTA Audit

The purpose of an audit is to certify the accuracy of the books and records of the Treasurer. It also assures the membership that the organization’s resources and funds are being managed in a professional manner. The audit process need not be complicated. A committee of three persons, none of whom are authorized to sign checks, can certify the records, using the simple procedure detailed in the LAPTA Toolkit: Treasurer. The annual audit is due to LAPTA on October 28, 2022 and should be reported to the membership.

Treasurer’s Reports

The Treasurer is responsible for preparing budget reports. A budget report showing actual income and expenses compared to the budgeted income and expenses shall be presented at each Executive Committee, Board of Directors, and General Membership meeting.



Fundraising

Fundraising is not a primary function of the PTA. The real working capital of a PTA lies not in its treasury, but in its members’ energy, resourcefulness, and determination to promote the well-being of children. Funds are raised when needed to conduct PTA work. Do not raise money just to raise money. National PTA suggests that when planning the year’s activities, PTAs should use the **three-to-one rule**. For every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children or others to advocate for school improvements. See *LAPTA Toolkit: Treasurer for more details*.

CHEDDARUP AND MONEYMINDER

The Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and collect membership dues. While there are several platforms, LAPTA recommends and uses **CheddarUp.com** to collect membership dues and **MoneyMinder.com** to track finances. CheddarUp also works as a website where documents can be uploaded, forms can be created, and items can be sold. It can work as an online store at little cost. PTAs can choose to have the buyers pay the purchasing fees. **MoneyMinder and CheddarUp partnered with each other. If you have \$179 to MoneyMinder Pro account, you get CheddarUp Team for free!**

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. Cost is \$179 per year. MoneyMinder has a new feature that allows you to e-file Form 990-N directly to the IRS! Form 990-EZ is coming soon. Add *easy tax filing* as another bonus!

The CheddarUp account must be in the PTA's name under the EIN. CheddarUp also requires a personal Social Security Number to open an account, which must come from an authorized bank signer. This can be updated for future Boards. CheddarUp has reports that show detailed 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. Budget the fees as an expense line item in the budget. **All deposit transfers** from CheddarUp must occur at least monthly directly into the PTA bank account and with a completed summary Deposit Form.

To open a CheddarUp account, use the link below to save 15% and give LAPTA a referral fee.



CheddarUp.com/?ref=LouisianaPTA



CheddarUp has the Basic entry level account that is free. If you plan to sell items such as t-shirts that have size, quantity, and color variations, then you will need to upgrade to Pro or Team account.

Basic

Jump right in
\$0 FREE forever

Basic features:

- ✓ Up to 5 items per collection
- ✓ Up to 1 form or waiver
- ✓ Track online and offline payments
- ✓ One-click spreadsheet export
- ✓ Free and unlimited withdrawals
- ✓ Low processing [fees](#)

Pro

Perfect for sellers
\$10/month with annual plan

All Basic features plus:

- ✓ Unlimited items, forms, and waivers per collection
- ✓ Require entry code
- ✓ Offer discounts
- ✓ Set start and end times
- ✓ Include taxes
- ✓ Add shipping at checkout
- ✓ Add multiple item images and variations (e.g., size and color)
- ✓ Visitor Reports
- ✓ Lower processing [fees](#)

Team

Add managers
\$30/month with annual plan*
**FREE with MoneyMinder Account*

All PRO features plus:

- ✓ Add managers and share data while keeping banking info private
- ✓ A Group Page — one URL with all of your collections
- ✓ Account-wide reporting
- ✓ Automatic (recurring) payments
- ✓ Lowest processing [fees](#)

- Visit Cheddarup.com/?ref=LouisianaPTA to save 15% off CheddarUp.
- Visit FriendsofLAPTA.CheddarUp.com to see a current PTA CheddarUp site.
- Visit MoneyMinder.com to start an account or get more information.

Social Media Administrators

Local PTA Units are encouraged to have an online presence through social media and other platforms. All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies. The purpose is to increase awareness, promote participation, and increase membership in PTA. Social media accounts must include “PTA/PTSA” or “Parent Teacher Association” to designate a different entity from the school. The administrators of social media accounts must be PTA Executive Committee or Board Members with a minimum of two administrators per account. The PTA has authority over the PTA social media accounts. Local PTA Units must respectfully work with their principals who shall be informed of any online accounts. Content must follow all school and school board rules, guidelines, and policies. No school may operate social media accounts with PTA/PTSA in its name.

Communication Strategy

Before posting on social media, take time to consider what information will be most useful for members and what communication methods will be most efficient. Use a variety of communication methods to reach all constituents. Not all communities have equal access to technology. Be aware of cultural and language differences and translate your materials into other languages as needed.

Social Media

Social media platforms allow PTA to connect to members and potential members in a very interactive way. PTAs can share information, photos, and videos that can help to increase membership, communicate with current and potential members, fundraise, generate positive exposure, receive feedback, and network. **Use social media to teach, remind, and recognize the members. Consistently monitor the sites. Give credit where it is due.** In the process of gathering ideas and being influenced by others, remember to provide a link to the original content and use the author’s name and/or organization whenever possible. **Keep content and comments professional and respectful. Be consistent.** Be sure to maintain consistency across platforms with PTA brand guidelines. **Be safe.** Be particularly mindful of child and family privacy.

Choose PTA individuals who are willing and able to provide high-quality basic social media posts, produce content, and moderate content posted by others. Disagreements are central to growing ideas, but do not attack anyone personally. Quickly address any inappropriate messages or misuse of the PTA brand. Be prepared to respond to negative or inaccurate posts if a reply is warranted; however, some negative comments do not require a response, while others should be taken seriously and addressed.

Personal lives and professional work can intersect on social media. Navigating between them can be difficult. Communicate the ground rules ahead of time to ensure that all volunteers are clear about the expectations. When volunteers communicate through social media, unless authorized to speak on behalf of PTA, they are representing themselves and should use a disclaimer that what is being said is representative of their own views and opinions. If an individual is speaking on behalf of PTA, that should also be made clear.

Privacy and Permission

PTA should not post photographs or images of any volunteers, families, children, etc., on any social media without having their express permission to do so. Secure a written consent form at events or at the beginning of the school year releasing the rights to use and post pictures. Do not discuss a situation involving individuals on a social media site that might identify the person. Don’t post anything that would not be appropriate to present at a conference or in person. When sharing information from another source, assume that it is copyrighted and properly cite the source or provide a link to the original content.

AIM Insurance offers additional coverage for Media Liability to cover online liability.

Remember, You Are Representing the PTA

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonsectarian content.
- Inform every family in the school about the aims and accomplishments of the PTA.
- Encourage and highlight attendance at PTA meetings and family engagement in PTA programs.
- Foster cooperation with the school in keeping parents informed about school functions, regulations, and procedures on child-related issues.
- Inform the community about PTA activities and school functions.
- Express appreciation to those participating in or contributing to programs.
- Tackle barriers such as language and culture by translating materials.

Ensure Quality Communication

- 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.
- Use the PTA logo in all communications.
- Abide by copyright laws and republish articles and art in an ethical manner.
- Do not include photographs of or specific information (names, class, email, address, etc.) about adults or students without written permission.
- Create visually interesting communications with careful use of photographs, bullets, quotes, and graphics.
- Have 2-3 people other than the author proofread prior to publishing or posting.
- Keep your message brief and to the point.
- Arrange for translation services.
- Date all materials.

Social Media Guidelines

- **All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies.**
- Have at least two administrators for each site.
- Posts should be PTA-related such as flyers, events, grants, PTA and school deadlines, and other information valuable to PTA members.
- Keep information current.
- Respond promptly to messages and comments.
- Cite or link the source of original content.
- State when someone is speaking on behalf of the PTA.
- Contact the insurance company to discuss additional coverage for Media Liability.
- Consult Louisiana PTA for further guidance at President@LouisianaPTA.org.

MEMBERSHIP

Membership is the backbone of PTA. When the local member at the school submits PTA dues, the Local PTA Unit is required to submit \$3.50 in dues to LAPTA. This amount includes \$1.25 dues that go to LAPTA and \$2.25 dues that LAPTA forwards to National PTA. This means that the member is a member of their PTA, LAPTA, and National PTA. See the *LAPTA Toolkit: Membership* for complete details.

LAPTA CENTENNIAL BUTTON PINS



It is a special birthday for LAPTA! To celebrate our centennial year, every member will receive a free button from LAPTA! The pin-on button is a 1½” circle with the blue and white “Here We Geaux!” slogan. It is important to submit dues monthly for every member so that LAPTA sends the correct number of buttons to the Local PTA Unit to distribute to their members with the membership thank you note. This really is a big deal and something to be very proud of. Please pass that enthusiasm on to the members!

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 would not 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*.”



MEETING TYPES

Meetings are held for members to make the decisions that direct the actions of the PTA and to be kept informed of the business conducted on their behalf. Only members participate in meetings. Non-members may attend but may not participate unless they are offered a *Courtesy Seat* or are listed on the agenda. **General Membership Meetings** include PTA members who paid their dues and direct the PTA work. **Executive Committee Meetings** consist of elected officers plus possibly others listed in the Bylaws. **Board of Director Meetings** consist of the President, Vice-President(s), Treasurer, Secretary, principal, parliamentarian, standing committee chairs (if specified in your Bylaws), and additional positions listed in the Standing Rules such as faculty representative and student representatives. Only Board members attend Board meetings. A non-Board member may request the President’s permission to address the Board to ask a question, give a report, or provide information, and then leave the meeting without participate in discussion or the voting process.

There are two types of meetings. **Regular meetings** are those set up by the Bylaws, plus the Board 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.

ELEMENTS OF SUCCESSFUL MEETINGS

All meetings share certain common elements. Some meetings may be more formal than others, but to be productive all must be organized and well-run. An agenda establishes the order of business. Be sure to follow the agenda, discussing and completing each item before going on to the next. It is much less confusing to stick to one topic at a time. The use of parliamentary procedure protects the rights of the members, while allowing the group to discuss the business at hand.

Meeting Dates

Set regularly scheduled meeting dates at convenient times for General Membership and Board of Director meetings to allow people to plan. Perhaps schedule meetings at two different dates or times to allow more people to attend. Check with other PTAs, feeder schools, and others in your community to coordinate dates.



Tips for Presiding Officers

Arrive early. Know the Bylaws. Study parliamentary procedure. Keep calm. Be tactful, appreciative, courteous, charitable, and well-groomed.

Presiding Officer

The President, or the Vice-President in the President's absence, is the presiding officer. The presiding officer calls the meeting to order at the specified time and, if a quorum is present, proceeds with business. The President refers to self impersonally as "the chair." In formal meetings of the General Membership, the President takes no part in business and should not express an opinion while presiding. The President facilitates the business before the group. In meetings with fewer participants, such as the Executive Committee, the President may participate, and parliamentary procedure may be less formal.

Preparing the Agenda

Robert's Rules of Order, Newly Revised states that the Secretary may prepare the agenda. However, many Presidents prefer to prepare it themselves. Read the previous minutes to find any business left unfinished at the last meeting. Confer with officers and committee chairs to see if they have a report. Have names of those who will speak written on the agenda. Do not call on anyone who does not have a report.

Parliamentary Procedure

Parliamentary procedure is a consistent set of rules that governs associations. The rules protect the rights of all attendees, require courtesy to all, and show partiality to none. It is not necessary to know all the rules, but a good basic knowledge is helpful in conducting a productive meeting. Have a copy of the Bylaws and Robert's Rules of Order, Newly Revised available at meetings for reference. It is helpful to have a Board member with some knowledge of parliamentary procedure. Most PTAs do not need a registered parliamentarian at every meeting.

Quorum

According to Robert's Rules of Order, Newly Revised, a quorum is the number of voting members who must be present to conduct business legally. The quorum refers to the number of such members, which is established in the Bylaws. For Board meetings, it is 50% of the Board roster plus one. Do not count a person more than once even if they serve in more than one position. Every meeting shall have the membership roster available and use a sign-in sheet. This is the best method to use when establishing a quorum. *A sample Roster sign-in sheet is in the LAPTA Toolkit: Secretary.*



AGENDAS

It is important to have an agenda to make sure business is conducted efficiently. The following is the normal order of business with further explanations below. *A sample agenda and sample Meeting Script are at the end of this section.*

- Call to Order
- Opening (Mission statement; optional)
- Approval of Minutes
- Treasurer Report (filed for audit)
- President Report
- Principal Report
- Officers Reports
- Standing Committees Reports, as needed
- Special Committees Reports, as needed
- Unfinished Business
- New Business
- Program
- Announcements
- Adjournment

Minutes

It is important that the minutes reflect an accurate account of what occurred at a meeting. The minutes should be entered into the official minute journal. If it is not in the minutes, then it did not occur. Minutes should be brief and indicate actions taken. The minutes should show the type of meeting (Executive Committee, Board of Directors, General Membership, Special, etc.), PTA name, date, time, location, name of presiding officer or Secretary, attendance (use roll call at Board meetings), a statement concerning the disposition of the minutes of the previous meeting (whether accepted or accepted as corrected), a record of all motions, the names of the maker of the motion (but not the name of the member who seconded it) and what action was taken on the motion, program topic, method of presentation, speakers and important points covered, and time of adjournment. *Full details are in the LAPTA Toolkit: Secretary. Approval of the minutes does not need a motion.* Once the “draft” minutes are read or submitted for review, corrections are solicited and made if applicable, and then the minutes become the “official” minutes and record of the PTA.

Treasurer's Report should show balance of funds on hand and expenses and deposits itemized to show the amount received or spent in each budget category. Actual budget amounts should be compared to budgeted amounts. Action is not taken on a financial statement. A motion is not made to approve the financial statement, except on the initially proposed budget. The statement is filed as part of the record.

Committee Reports

From time to time, committees may be required to report their progress to the General Membership. Usually, the chairperson presents the report. Not every report will require action. If a report gives information only, not even a motion to accept the report, is required. The report is "heard" and placed on file with the Secretary. If a report requires the approval of the members, the person making the report moves its adoption. Because the recommendation for action comes from a committee, the motion requires no second. Once the motion is on the floor, it is debatable and amendable as is 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 for program 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." Adjourning the meeting before the program is not an acceptable practice. Many PTAs have a social time with refreshments after the close of the meeting.

PARLIAMENTARY LAW

Parliamentary law or procedure originated with the British Parliament. They are designed to maintain order, ensure justice and equality, expedite business, and enable an organization to accomplish the objectives for which it was formed. These rules are based on logic, good sense, and fair play. It is democracy in action. Every member should understand at least the fundamentals or correct procedures. Robert's Rules of Order, Newly Revised is the parliamentary authority adopted by all levels of PTA.

Parliamentary procedure requires all to accept the will of the majority and respect the opinion of the minority. The President, as the elected leader, is to carry out the will of the assembly, not bend the will of the assembly to their own. Remember, authority is vested in the office, not in the person.

All members are equal. An established number of voting members must be present to conduct business, or quorum. Only one main motion may be before the assembly at a time and only one member may have the floor at any one time. A two-thirds vote is necessary when a motion limits or interferes with the privileges of a member or of the assembly Bylaws, cutting off debate, closing nominations, and rescinding action without notice.

Quorum is the minimum number of members who must be present to conduct business at a meeting. The number of General Membership members constituting a quorum is indicated in the unit Bylaws.

A motion formally proposes that the organization take a certain action or express certain views. A motion introduces business in a meeting. A main motion brings a subject before the organization for its consideration and action. There are eight steps to a motion:

- 1) **Obtaining the floor:** member rises and addresses the chair by proper title.
- 2) **Assigning the floor:** the chair recognizes the member.
- 3) **Member states his motion:** member says, "I move . . ."
- 4) **Seconding the motion:** another member must second the motion letting the chair know that more than one person has an interest in the subject of the motion by saying, "I second the motion."
- 5) **Stating the motion:** chair restates the motion thereby formally placing the motion before the assembly. After the chair has stated the motion and before a vote is taken, it may be desirable to change or amend the motion in some way.
- 6) **Discussion (or debate):** must be addressed to the chair and continues until no one wishes to speak or until someone moves to close debate. To close debate, a member says, I move the previous question. The motion requires a second, is not debatable and requires a 2/3 vote. If the motion to close debate is adopted, the chair immediately takes the vote on the motion pending.
- 7) **Putting the question (or taking the vote):** The chair restates the motion, states the method of voting, and calls for both affirmative and negative votes.
- 8) **Announcing the vote:** the chair announces the result of the vote and states the action the assembly will take.

Motions must be expressed in a clear, concise statement containing only one main idea. The correct language is "I move that" or "I move to." The maker of the motion should be allowed, if he wishes, to begin discussion. A motion that does not come from a committee must be seconded. On rare occasions, the presiding officer may enter a discussion. He must relinquish the chair for the duration of the discussion and the vote. The President may vote on a pending question when their vote would change the outcome to break a tie. The President may also vote when voting is by ballot so as to keep their opinion private and not sway the members.

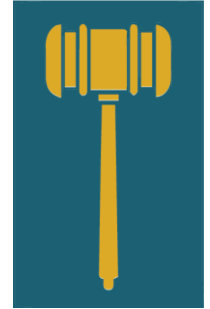
Rules of Conduct

No one has the right to do anything that prevents others from seeing or hearing the presiding officer or speaker. 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. The chair calls upon the others as soon as possible.

PROBLEM SOLVING

Resolving conflict can be time-consuming and quickly drain a Local PTA's resources. Most problems are related to communication issues. It is often important to talk with people directly versus emailing or hearing of issues from other individuals, to get to the heart of the matter. When handled properly, conflict can create positive outcomes, such as promoting growth, increasing communication, developing problem-solving skills, increasing team building, and bringing about change. Steps to problem-solving within your PTA are:

- Create an open and friendly environment and respect other leaders.
- Give clear expectations of outcomes.
- Allow individuals to do their own work.
- Communicate any limitations for a proposed project (budget restrictions, timing, etc.)
- Provide encouragement and guidance privately and offer praise publicly.
- Provide information, referencing where resources can be found whenever possible.
- Listen when concerns are raised.
- Investigate problem situations from all sides.
- Share best practices and solutions to problems.



How to Handle Disruptions in Meetings

The PTA that is informed and alert can best guard against disruptions. However, it may not be possible to avoid. The presiding officer should maintain poise in the face of interruption, wait for the disrupter to finish, suggest that the speaker be allowed to finish his sentence or thought, and suggest that in this group it is regarded as simple courtesy not to interrupt a speaker. If the disruption continues, repeat the above statement, but do not try to out-talk or out-shout the other person. If there is whispering in small groups, remain silent to get attention. Do not start talking again until the whispering stops. If name-calling is resorted to, calmly say, "Of course, you are entitled to your own opinion. May we go on now?" If integrity is challenged, do not be defensive. Suggest that opinions are not facts. Do not mislay your sense of humor! A humorous remark has pricked more than one inflated balloon or relieved many a tense situation.

Parliamentary Procedure Tips

The chair recognizes the privilege of everyone to agree or disagree with the views of a speaker. The speaker is stating his opinion and is not asking for conclusions from the audience, so interruptions are inappropriate. Board members with a background in parliamentary procedure should be present to aid the President with helpful motions at opportune times. Honest differences of opinion may be discussed at the close of the meeting.

Local Bylaws should contain the following statement: "The privilege of making motions, debating, and voting shall be limited to members of the association who are present and whose dues have been paid." It may be helpful to call this to the attention of the group or to an individual who is not a member of the association. The Secretary should have a current list of those members who have paid their dues and are voting members. If a discussion is to be held which has the potential of becoming heated, it is helpful if ground rules for debate are established and accepted by the group in advance. While persons other than members may be present, remember that the PTA still has the privilege of restricting the right to speak and vote to its members.

School Level Complaints

Occasionally, a PTA President or Board member will receive a call from someone who has a problem or complaint about something that happened at the school. The PTA is not responsible for handling complaints about the school or the staff. Parents and students have rights and responsibilities, and you can act as a resource person by providing information. Beyond that, the individual must follow prescribed district procedures to solve the problem. Refer the parent to the school district's policy on handling complaints. The usual "chain of command" is: 1. the teacher, 2. the principal, 3. the principal's supervisor, 4. the superintendent, and 5. the School Board.

PRESIDENT'S DUTIES CHECKLIST

Monthly Duties

- Prepare agenda and preside over the Board of Director and General Membership meetings.
- Review and distribute the Treasurer's report and minutes of the previous meeting for approval.
- Confirm that National and Louisiana PTA dues and membership lists are submitted to LAPTA.
- Check the Bylaws and Standing Rules for dates of upcoming required business.

Familiarize yourself with the following:

- Your PTA Bylaws and Standing Rules. Request a current approved copy from Bylaws@LouisianaPTA.org.
- Get a copy of Robert's Rules of Order, Newly Revised.
- 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 approve the appointment of historian and parliamentarian (if one is indicated in your Bylaws) and to appoint standing committee chairs.
- Ensure Board members met with their predecessors to receive relevant information.
- Submit to LAPTA your name and contact information at LouisianaPTA.org/submit-office-data-1.
- Encourage Board members to attend LAPTA Training.
- Encourage Board members to subscribe to National and Louisiana PTA electronic publications.
- Assess needs and set goals and objectives with your Board and the principal.
- Have a meeting with your principal to set the calendar for the year and review PTA goals.
- Know your PTA's Federal Employer Identification Number (EIN).
- Arrange for a meeting at the bank to change signers on the PTA's account. Call bank for details.
- Set up "Presidential" folders on your computer or cloud storage for shared files and President's binder.
- Follow PTA social media.

June/July/August

- Attend the National PTA Convention in June if your budget allows. Grants are available.
- Attend LAPTA Leader Training in August.
- Obtain and change the passwords to the PTA's accounts.
- Schedule an introductory meeting with the principal.
- Request Bylaws on the new template 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. Note any changes needed for adoption.
- Have the Board sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Verify the schedule of monthly Board meetings for the entire year. Consider varying the start times and days of the week to allow more members to attend.
- Review submission dates for insurance policy. Proof of insurance will be required in 2023-24.
- Renew Articles of Incorporation Annual Report with Louisiana Secretary of State at geauxbiz.com.
- Preside over the first General Membership meeting of the year.
- Form the Audit Committee who will work on the Annual Audit Report due by October 28, 2022.
- Communicate PTA goals for the year.
- Intentionally reach out to new families at your school.
- Consider a welcome back to school celebration for staff and families.
- Host a volunteer orientation.
- Create a Welcome Packet for all students. Include membership ask, calendar, PTA Programs, and more.
- Adopt the Annual Report and Audit Report if complete.
- Create or update the CheddarUp.com account for the year. Offer online membership dues submittal.
- Create the new year and budget on MoneyMinder.com (highly recommended).

September/October

- Preside over the first General Membership meeting of the year if not held in August.
- Approve the proposed budget at the first General Membership meeting.
- Renew insurance policy.
- Appoint a committee to review Bylaws and recommend revision or amendments if needed.
- Communicate PTA goals for the year.
- Complete the Active Affiliation Report for LAPTA at <https://form.jotform.com/221816998285068> which is due October 28, 2022.**
- Confirm your program for the next General Membership meeting.
- Touch base with each officer/chair about upcoming duties or events.
- Share the Local PTA Awards as published in the *LAPTA Toolkit: Awards, Grants, and Contests*.
- Conduct the fall membership enrollment campaign. Submit member dues at LouisianaPTA.org/membership.
- Conduct the National PTA Reflections program. See LouisianaPTA.org/reflections.

November/December

- IMPORTANT:** Confirm that the Treasurer electronically filed the appropriate IRS return by November 15.
- Check-in with officers and committee chairs.

January/February

- Celebrate National PTA Founders' Day (February 17, 1897).
- At a membership meeting, elect a Nominating Committee and alternates as prescribed in the Bylaws.
- Ensure that the first meeting of the nominating committee is scheduled and provide clear instructions and guidelines to the Nominating Committee.
- Amend your budget, as necessary.

March/April

- Publish slate of candidates, as determined by the nominating committee, according to Bylaws.
- Conduct election of new officers.
- Actively recruit volunteers to fill open committee chair positions for next year.
- Remind the newly elected President to call a meeting within 30 days to fill Board positions and conduct any other necessary business.
- Connect current PTA leaders and volunteers with those at the next PTA (middle school, high school).
- Check-in with officers and committee chairs.
- Contribute to the PTA Annual Report or coordinate with historian/Secretary.
- Consider a membership survey to review past activities and solicit suggestions for new activities.

May/June

- Present at the annual (last) meeting a preliminary Annual Report, which is a year-to-date summary report of the year's activities.
- Coordinate installation of new officers. Thank this year's PTA Board and school volunteers.
- Submit your new local officer contact information to LAPTA.
- Remind outgoing officers and committee chairs that their procedure binders and materials must be submitted within 15 days after the end of the term. Consider a transition meeting or event.
- Pass all information along to the newly elected President, including all passwords to all accounts.
- 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 for a job well done!

DOS AND DON'TS OF PARTNERING WITH ADMINISTRATORS

Do:

- **Plan together.** Learn administration goals and discuss how your PTA can engage families in supporting those goals.
- **Connect to resources.** Talk with the principal about how state and National PTA programs and resources support and enhance student learning.
- **Be respectful.** You do not always have to agree. Find a way to communicate in a professional and respectful manner with your school's leadership.
- **Differentiate.** Help school administration understand that your Local PTA Unit is a separate and independent child advocacy group, part of and supported by a large and experienced association.
- **Meet regularly.** Consider a regular monthly coffee or lunch with the principal or arrange a regular phone call. Invite the superintendent to Board meetings. Stay in touch.
- **Make the connection visible.** Ask your principal to provide a report at PTA meetings, or to write an article for your PTA's newsletter or post for the PTA blog. Plan an open-to-all "chat with the principal" or "coffee with the superintendent."
- **Engage families.** Share the National PTA Standards for Family-School Partnerships materials. Collaborate on building better family engagement and improving student success. Consider registering in the National PTA Schools of Excellence program.
- **Engage community.** Invite community groups or youth-serving organizations to the school for PTA events. With the principal, identify community service opportunities for families.
- **Encourage participation in the budget process.** Give parents the info they need to effectively advocate during budget time. Help parents support the education budget.
- **Stay on the same page.** Follow up all phone calls and meetings with a summary of what was discussed and confirmation of any action steps to be taken by the PTA or administration.
- **Ask to speak at teacher meetings.** Ask to be treated as a partner in education, a vital part of the connection between home and school.

Don't:

- **Be adversarial.** Developing a working relationship is well worth the effort. Find common ground. Model civil discourse, even if it is difficult to deal with administration.
- **Comingle funds.** Mixing private and public funds is forbidden. No PTA funds should ever be deposited in a school account and no school funds should find their way into a PTA account.
- **Give up control of the checkbook.** PTA is a separate entity from the school. PTA funds are controlled by PTA members and Board. The checkbook resides with the Treasurer.
- **Cede control of PTA meetings.** All members—even administrators—have the same rights at meetings. The PTA President or the President's delegate runs the PTA meeting, in compliance with PTA Bylaws and using Robert's Rules.
- **Get in trouble with the IRS.** Know the rules and file the proper forms with the IRS. PTA's funds are not school funds; do not use the school's EIN. Consult your state PTA if you have questions.
- **Open your PTA to theft.** No administrator wants to deal with the negative publicity surrounding a PTA's poor money management. Use good business judgment, ensure financial reports and audits happen, and follow your state PTA's rules about money-handling.
- **Entangle administration in personality issues.** Sometimes personal issues interfere with PTA function. To maintain a professional, credible relationship with administration, work through your personal problems without involving administration. Seek help, if necessary, from your state PTA.
- **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 your PTA to be viewed as a bottomless source of funding available for all administration requests. Raise awareness rather than raise funds.

DOS AND DON'TS OF PARTNERING WITH TEACHERS

Do:

- **Plan together.** Working to achieve common goals is a powerful tool to build relationships. What are teachers trying to achieve? How can PTA help get parents and community involved?
- **Invite teachers to join and become involved.** Ask teachers to attend meetings and provide input. Identify ways for teachers to become involved even if they cannot attend a meeting. Create a campaign specifically messaging PTA's value to teachers and ask teachers to support your PTA's work by joining PTA.
- **Identify volunteer opportunities.** Work with teachers to identify classroom and activity-related volunteer opportunities, and then find volunteers to assist.
- **Show respect.** Let teachers know that your PTA values them. A good working relationship between home and school is essential to student success.
- **Seek input.** Suggestion boxes, surveys, one-on-one meetings, program assessments, etc.—ask for teachers' input on PTA's impact and on the success of PTA programs and encourage teachers to offer suggestions for improvement.
- **Build a team.** Informal social gatherings, game/fun nights, family sporting events and outings—how can your PTA build relationships outside the classroom among PTA Board members, parents, and staff?
- **Show appreciation.** Thank teachers for their support of PTA and the work they do for children. Plan meaningful Teacher Appreciation Week activities, and regular recognition of teacher's efforts.
- **Demonstrate cooperation.** A strong PTA-teacher relationship is a partnership. How can PTA help teachers? What can staff and PTA leaders accomplish together? Approach all interaction with teachers in a spirit of cooperation.

Don't:

- **Criticize teachers for missing PTA meetings.** While teachers' meeting attendance is a good goal for a PTA, it is important to 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 grade or classroom activities should not be tied to teacher membership.
- **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 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. And brief teachers on PTA priorities and successes. Help teachers understand the value PTA brings to their place of work.

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 (see below); Board roster
- 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, budget reports from meetings
- Record of all debit cards and their account numbers
- 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 Board of Directors
- Inventory Accountability Form
- Membership roster
- Miscellaneous papers, including correspondence

SAMPLE PASSWORDS & ACCOUNTS SUMMARY

ABC PTSA Passwords & Accounts 2022-2023

PTA LUR #: 9999

IRS EIN# 99-9999999

Monthly/Annual Renewal Required for the Following:

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

Moneyfinder.com: email & password

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

SquareUp.com: email & password

Zoom: email & password

Mailchimp.com: email & password

Other Accounting Software: password

Facebook: Note admin names plus their phone numbers; passwords are their current accounts' passwords; have at least 2 people listed as admins

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

Debit Cards: person's name, account number

Email Accounts: (the President might only hold this.)

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.

FUNDRAISING STRATEGIES

The following seven questions help to analyze fundraising strategies and activities to select those that best meet student, school, and community needs. Use these questions as a guide to brainstorm effective fundraising strategies that will raise the money the school and community require and educate the students about the value of philanthropy.

1. What values provide the basis for why you are raising funds? Fundraising efforts should be focused on why the fundraising needs to be done. The first step is to identify the need, the opportunity, or the problem to be solved. Don't fundraise just to fundraise. There needs to be a reason and a need. Once you have identified the problem and solution, identify the values or concerns that a prospective donor must have to want to give to this cause. Ask volunteers to identify groups in the school and community that have expressed those key concerns and values. The final step in the planning process is selecting fundraising strategies that align with the identified values and that attract potential donors' attention to the need or cause. All of us use our time and money to reinforce what we value. Are your fundraising strategies based on values? Do your volunteers understand the values and the need?

2. What is the cost per dollar raised for this fundraising activity? Efficient fundraising incorporates the cost per dollar raised as part of the fundraiser selection criteria. The math is quite simple: just divide the expected costs by the anticipated revenue. In almost all product sales fundraisers, 50 percent or more of the revenue (sales) goes to provide the product. When you look at the other costs involved, like the cost of making posters, the cost per dollar raised is even higher. In addition, you should factor in how much time from the students, parents, PTA organizers, teachers, and advisors is required even though time is not a direct cost.

3. Does this fundraising strategy give donors options? Does your fundraiser allow donors to give more of their money or time if they want to? Consider allowing a donor to determine their own level of support. Donors want to be able to give their help, time, and money according to how much they value your organization, goals, and programs. Make sure donors are free to decide how much and how often they contribute and what their level of involvement will be.

4. If students are involved in the fundraising activity, are they learning about the concept of philanthropy? Does student involvement focus on giving or on getting? Philanthropy has become a compelling force in our economy. Seldom do our students get exposure to or encouragement in careers in philanthropy, even though much of our nation's job growth is in the nonprofit, philanthropic area. Philanthropy is important to our society. The giving of resources such as time and money provides meaning to our lives and service to others. Today's student is tomorrow's donor and member of service clubs, religious groups, and nonprofit boards. If students realize that their school fundraising efforts are practice for the rest of their lives, the more seriously they will take these activities.

5. Does this fundraiser involve incentives or prizes for sales? Sales incentives focus a fundraiser on competition and getting something, rather than on values and giving. Remember to focus on giving.

6. Have you considered the integrity of businesses offering support? Partnering with a local corporation can be a very beneficial fundraising strategy. It demonstrates community support and creates awareness about the school's needs. It is important to evaluate any company with which you consider aligning your school or PTA.

7. How will this fundraiser and the projects and programs it supports benefit the community? School fundraising activities should positively affect the community. Having better schools improves the community, but how do school and PTA projects affect a community? Whenever possible, explain the connections between your project and the world outside the school.

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

YEAR-END CHECKLIST & TRANSITION GUIDANCE

As a PTA leader, there are several key things you must do before the end of the school year. By completing these tasks, you help your successor start off on the right foot, while you enjoy your summer guilt-free.

- Meet with your successor as soon as possible. If you do not have a successor yet, plan to meet with them later. In advance of the meeting, prepare a timeline of the past year. Cover the job basics, the timeline, a summary of where things stand now, etc. Schedule a follow-up turnover meeting, if needed.
- Hold elections! Email the new officers' contact information to office@LouisianaPTA.org no later than May 25.
- Pay any remaining outstanding membership dues at LouisianaPTA.org/membership.
- Close out your books on June 30. Make sure all reimbursement requests are submitted in time for you to write checks before the books close. Ask about any outstanding checks not yet cashed.
- Go to the bank with the new Board members and switch account signature responsibilities, as necessary. Make sure the right people are on the bank account for the incoming year.
- Make sure Treasurer's Year-End Checklist is complete.

Notes to pass on to your successor:

- Things I did during my term in office that my successor should know and practice
- Things I wish I did all year (had I known then what I know now) that my successor should know and practice
- Things I suggest that my successor address during the first 30 days of their term of office
- Things that would instill an effective Board and help to conduct productive Board meetings
- My final thoughts to the new Board leadership team for their success

The Outgoing Board should always:

- Meet to debrief and evaluate the work for the year and offer suggestions for improvements
- Fully complete your term and tasks
- Meet your successors
- Update all Officers at LouisianaPTA.org/submit-officer-data-1 for the new school year even if some officers are remaining in their current role.
- Turn over all resources and materials in a timely manner
- 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 for LAPTA Training Events and attend the LAPTA Annual Meeting.
- Familiarize yourself with information available at PTA.org and LouisianaPTA.org.
- Register at LouisianaPTA.org/submit-officer-data-1.
- Order any necessary materials and supplies.
- Fill any vacancies and appoint chairpersons if necessary.
- Work on your goals for the year and develop your calendar of events.
- Meet with school administration.
- Ensure that year-end financial reports are complete to begin your budget work.



WHAT IS ACTIVE AFFILIATION?

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 nine items which are detailed later in this section. The files are easily submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTAs that do not maintain Active Affiliation will be subject to the Retention Plan. See the next page for detailed list of items.

WHAT IS THE RETENTION PLAN?

If a Local Unit fails to submit the Active Affiliation Packet by the yearly deadline, then the Retention Plan is initiated by LAPTA. When a Local Unit fails to submit the yearly requirements to maintain its IRS non-profit status and National PTA affiliation, then LAPTA has a “Retention Plan” to get units back on track. 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 PTAs might inherit a PTA not in compliance and are usually not initially familiar with the requirements of Active Affiliation. 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.

There are five phases to the **Retention Plan**.

1. **Notification:** LAPTA notifies the PTA of the missing Active Affiliation Report (due October 28, 2022) and gives the PTA 30 days to submit the report from the date of notification.
2. **Restriction:** After 30 days without proper submission, the PTA moves into the **Restriction Phase**. The Local Unit is given 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. **Restructure:** After 60 days without proper submission, the PTA moves into the **Restructure Phase** where LAPTA may choose to restructure the leadership of the PTA. However, a PTA may sign a “Plan of Action” to avoid the Restructure Phase and instead move directly into the Intervention Phase. If no Plan of Action is implemented, then the LAPTA may consider moving the Local Unit into the Dissolution Phase earlier. *See Plan of Action Form at the end of this section.*
4. **Intervention:** After a PTA signs a Plan of Action, then the LAPTA will assign a support team and the Plan of Action is implemented according to its details and dates.
5. **Dissolution:** A Local Unit is considered for revocation of their charter and loss of their LAPTA associated IRS 501(c)(3) nonprofit status under these circumstances: Active Affiliation is not acquired for three consecutive years; 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 Unit Bylaws Template, adopted May 2022, Articles II and III. The Local PTA must cease and desist further use of the PTA name when the charter is revoked. Bank and online accounts must be closed with any remaining funds donated to a PTA.

WHAT IS THE REACTIVATION PHASE?

If a PTA has not maintained Active Affiliation for at least three years but wants to reaffiliate with Louisiana PTA and the National PTA, then the Local Unit may move into the **Reactivation Phase**. For Local Units that have not filed taxes for at least three years yet want to reactivate their PTA, LAPTA is here for you. First, contact LAPTA at aafiles@LouisianaPTA.org. It is recommended that you apply online for a new EIN with the IRS with a new PTA unit name. Complete the **Reactivating an Existing PTA Packet**.

ACTIVE AFFILIATION REPORT

DEADLINE: OCTOBER 28, 2022

Each membership year, local PTAs must submit the following requirements to obtain **Active Affiliation Status with Louisiana PTA and National PTA**. The files are easily submitted online at <https://form.jotform.com/221816998285068> or scan the QR Code. PTAs that do not maintain Active Affiliation will be subject to the Local PTA Retention Plan.



When submitting the report online, you need the Local PTA Unit name, parish, LUR#, and the President's name, email, and phone number. You will then upload the following items individually into the corresponding field.

Required forms are:

1. **MEMBERSHIP:** Submit member dues to LAPTA for all members with a minimum requirement of 30 members. Go to LouisianaPTA.org/membership and select *Submit Unit Dues*. Save the email confirmation of payment.
2. **LEADER DATA:** Submit to Louisiana PTA the name and contact information of the Board and Committee members and chairs within 15 days of election or appointment at <https://form.jotform.com/221275677028157>.
3. **BYLAWS:** Submit the first page of Bylaws showing the LAPTA approval stamp and approval date. Bylaws must be updated every three years with the LAPTA Bylaws Template. Visit LouisianaPTA.org/bylaws.
4. **TAXES:** Submit proof of 2020 filed and accepted IRS Form 990 tax filing.
5. **BUDGET:** Submit the Local Budget Approval Form and the Approved Annual Budget.
6. **AUDIT REPORT:** Submit the Audit Committee Report for the previous year.
7. **ARTICLES OF INCORPORATION:** Submit the updated Annual Report of the Articles of Incorporation from Louisiana Secretary of State at geauxbiz.com.
8. **INSURANCE:** Submit the insurance declaration page, if applicable. This will be required for 2023-24 year.
9. **TRAINING:** Submit proof of PTA Leadership Training for all officers at either the LAPTA Leadership Training or at PTA.org. (Create a PTA.org account, go to *My Profile*, select *eLearning* or *Thrive*, and download the eLearning certificates.)

If the Active Affiliation Report is not submitted by the yearly deadline, then the Local PTA **Retention Plan** will be initiated. The five phases of the Retention Plan are Notification Phase, Restriction Phase, Restructure Phase, Intervention Phase, and Dissolution Phase. For a PTA not in compliance, complete the *Plan of Action Form* at <https://form.jotform.com/221817137059053>. For Local Units that have not filed taxes for at least three years yet want to reactivate their PTA, complete the **Reactivating an Existing PTA Packet**.

Questions? Email LAPTA at afiles@LouisianaPTA.org.

ACTIVE AFFILIATION: PLAN OF ACTION

For Local Units in the Restructure Phase, contact LAPTA at aafiles@LouisianaPTA.org to discuss your situation. Complete the Plan of Action Form online at <https://form.jotform.com/221817137059053> or scan the QR Code to work toward Active Affiliation status. This form is for your records only.



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

CHOOSE all that apply. Note the date for each item after speaking with LAPTA officer. Active Affiliation Report was incomplete because:

- MEMBERSHIP: A minimum of 30 LAPTA membership dues was not submitted.
New deadline: _____ Emailed to LAPTA Date: _____
- LEADER DATA: Board data was not submitted to LAPTA at <https://form.jotform.com/221275677028157>.
New deadline: _____ Emailed to LAPTA Date: _____
- BYLAWS: Bylaws are outdated or were not submitted.
New deadline: _____ Emailed to LAPTA Date: _____
- TAXES: IRS taxes were not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- BUDGET: Local Budget Approval Form with the Approved Budget was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- AUDIT REPORT: Audit Committee Report was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- ARTICLES OF INCORPORATION: Active Annual Report from LA Secretary of State was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- TRAINING: Proof of PTA Leadership Training for all elected officers was not filed.
New deadline: _____ Emailed to LAPTA Date: _____

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 Name	LAPTA Officer's Name
-----------------------------	----------------------



Submit the information online at <https://form.jotform.com/221817137059053> or scan the QR Code.

ICEBREAKERS

An easy way to promote inclusion at PTA meetings is to encourage members to interact with each other. Include an icebreaker at your PTA meeting as a fun way to get people acquainted and to feel included. It's a great way to start meetings, encouraging engagement and meaningful introductions before diving into business.

- What is our main goal with this ice breaker? Determine whether your goal is to help people get to know each other better, to inspire some fun competition, or to have people walk away having learned something new.
- How is our ice breaker inclusive? Keep in mind that your participants might have different abilities, interests, and beliefs. Make sure it is accessible and does not exclude anyone from actively participating.
- How is our ice breaker interactive? Ice breakers are a great way to help people mingle and step out of their comfort zone. Plan an ice breaker that helps participants spark new connections and relationships.

What Do You Love?: Each person states one thing that is non-PTA related that they love. Then others who also love the same thing raise their hands or otherwise gesture.

Culture Club: Participants break into small groups and pick three areas of their families' cultural values from a list 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.

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" or what comes out in face-to-face encounters. 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.

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 your trivia game. Choose the format you'd like to use to host your 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 after each one 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 process until all facts have been read.

SAMPLE AGENDA

Madison High PTA Board Meeting

January 19, 2022

AGENDA

Meeting called by Tera

Executive Board Members:

President: Tera
Vice-Presidents: Shelley & Beth

Treasurer: Carolyn
Secretary: Stephanie

Committee Board Members:

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

Beautification: Bessy
Box Tops: Amy
Newsletter: Angie, Doris
Uniforms: Carolyn
Grants & Awards: Christie
Teacher Rep: Erin, Sarah

- Opening: PTA Mission: 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
- Ramrock note; Slime date
 - Bring-a-Buddy Breakfast; teacher treat day note
- Committee Reports
- Principal’s Report..... Mrs. Welch
 - Membership Committee..... Katie
 - Volunteer Committee..... Sandra
 - Fundraising..... Tera
 - Hospitality Jenn
 - Room Moms Kristie
 - Reflections Shelley
 - Art Parents..... Amy
 - Beautification..... Bessy
 - Box Tops Committee Amy
 - Newsletter..... Angie
 - Uniforms Carolyn
 - Grants & Awards..... Christie
 - Teacher Representative Erin/Sarah
- New Business
- Upcoming Flyers/Events - Beth
- 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 |
- Adjournment Tera

SAMPLE MEETING SCRIPT (FORMAL)

Call To Order (Required)

The President, as the chair, stands and calls the meeting to order. The President declares if a quorum is present, and the Secretary notes the fact in the minutes. Quorum for the Board meeting is the majority of filled positions or 50% plus one (no one counts twice). Quorum for General Membership meeting is stated in the Bylaws.

- PRESIDENT: "The meeting of _____ PTA is called to order at _____ (time). A quorum is present." If the Secretary or the parliamentarian is not present, the chair appoints member(s) to perform those responsibilities for the meeting.
- PRESIDENT: If Secretary/parliamentarian is absent, "At this time, due to the absence of _____, the chair would like to appoint _____ as (parliamentarian/Secretary) for this meeting."

Opening Ceremonies (Optional)

The PTA Mission, Pledge of Allegiance, or an inspirational message may be presented. These are suggestions.

- Option 1 PRESIDENT: "Please welcome _____, who will read the PTA Mission."
- Option 2 PRESIDENT: "Please stand for the Pledge of Allegiance of the United States (and Louisiana)."
- Option 3 PRESIDENT: "Please welcome _____, who will share an inspiration with us."

Introductions (Optional)

Begin introductions with special guests. PRESIDENT: "At this time the chair would like to welcome _____."

Explanation of Meeting Technology and Rules for Virtual Meetings

PRESIDENT: "In order to make sure everyone is comfortable with our meeting technology let's review a few options you may need today throughout the meeting. (Explain how to raise hand, unmute, chat, and any other features you plan to utilize. If using the free version of Zoom, explain your plan should your meeting exceed the 40-minute limit.) During the registration process we verified all email addresses so should we need to conduct a ballot vote, you should have no issues receiving your ballot using that email. During this meeting, we follow these rules: The chair gives the chance to speak to every member who wishes it. Pro and con speakers should be 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 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 President wish to debate, the chair must 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. Members cannot close debate by shouting, "Question." A member must seek recognition and make the motion properly and requires a 2/3 vote to pass."

Minutes (Required)

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

- Option 1 - PRESIDENT: "_____, Secretary, will now present the minutes from the last meeting. SECRETARY: (reads minutes) 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 as corrected."
- Option 2 - PRESIDENT: "The draft of the minutes has been distributed for your review. Does anyone need a copy? Are there any corrections to the minutes? Hearing none, the minutes will be approved as presented." Or, if corrections are needed. "The minutes are approved as corrected."

- Option 3 - PRESIDENT: “The minutes of the prior meeting were approved by the committee on _____. A copy of the minutes is available from the Secretary, and corrections to the minutes should be referred to the Secretary.”
- The chair may appoint a committee to approve the minutes from the current meeting. Committee approval is recommended when the length of time between meetings causes concern for accuracy. PRESIDENT: “If there is no objection, the chair will appoint a committee to approve the minutes of this meeting. Hearing no objection, the chair appoints _____, _____, and _____.”

Financial Report (Required)

The chair recognizes the Treasurer for the financial report. The Treasurer stands, addresses the chair, and reads the report. A financial report is not optional and must be presented at every meeting. 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 for financial reconciliation. 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 \$_____, as of [date]. Here is the reconciliation report and the current budget compared to actual amounts.” PRESIDENT: “Thank you, are there any questions? Hearing none, the financial report will be filed for financial reconciliation.”

Letters or Communications

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

Board of Directors Report

A summary report of the Board’s work is given at every General Membership meeting and contains any motions made in the Board meetings. The Secretary reads a summary report (not the minutes) for the information of the members. The Secretary moves the adoption of each recommendation individually. PRESIDENT: “_____, Secretary, will give the Board 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? (pause) _____ has moved that _____. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’” President announced the outcome of the vote, “The motion passed/failed.”

Officers Report

Before the meeting, the President consults with all Board members to determine who has a report. At the meeting, the President calls for the report of the officers. A report from an officer may be informational or require action. Reports with information only are read to the voting body and no motion is needed. Those reports requiring action are presented as a motion to the membership. The member presenting the report moves the adoption of the motion. The members will vote to approve either as presented, amended, or rejected. PRESIDENT: “At this time, _____ will give a report regarding _____.” OFFICER: Reads the report and makes any recommendations. “I move that _____.” PRESIDENT: “_____ has moved that _____. Is there a second? _____ would you like to speak to your motion? The person making the motion will speak to their motion. “Is there any further discussion? Are you ready for the question (vote)? _____ has moved that _____, all those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed or failed.”

Approval of Budget

The proposed budget for the next fiscal year is presented to the Board of Directors for its consideration, not approval. At the General Membership meeting, the budget is considered for approval. PRESIDENT: “_____, chair of the Budget & Finance Committee will now present the 20__ - 20__ proposed budget.” TREASURER: Each line item should be read. After reading the items state “By direction of the budget & finance committee, I move that the 20__-20__ proposed budget be adopted as presented.” PRESIDENT: “The Budget & Finance Committee has moved to adopt the 20__-20__ proposed budget as presented. This comes from 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.”

Budget Amendments

When the Treasurer proposes any budget amendments: PRESIDENT: “_____ will now present the budget amendments.” TREASURER: Each line item should be read, the current amount, the amount of the increase/decrease; then the new amount of the line item. 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.”

Standing Committee Chair Reports

Before the meeting, the President consults with all Board members and standing committee chairs to determine who has a report. At the meeting, the President calls for the report of the committee. 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. If no recommendation is made, no motion is needed. Use the same script as above.

Special Committees and/or Special Orders

The chair calls for the report of the special committees if needed. The reports of special committees follow the same rules as those for standing committees. If no special committees exist, this item of business does not appear on the agenda. Motions made a “special order” (by a two-thirds vote at an earlier time) are addressed. Also, matters required by the Bylaws to be taken up at a specific meeting are in order at this time.

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, “By direction of the Audit Committee, I move to adopt the Audit Report as presented.” PRESIDENT: “_____ has made a motion to adopt the Audit Report as presented. This comes from the 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.

Appointment of Nominating Committee

PRESIDENT: “The next item is the appointment/election of the Nominating Committee; our parliamentarian _____ will now read the Bylaws regarding the Nominating Committee.” PARLIAMENTARIAN: The parliamentarian should read directly from the Bylaws, Article on Nominations and Elections, the sections regarding nominating committee election. PRESIDENT: “Thank you. The floor is now open for nominations for members of the Nominating Committee” 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 by saying, “_____, you have been nominated as a member of the Nominating Committee. Do you accept this nomination?” The nominating committee is elected by plurality. PRESIDENT: “The nominating committee will be _____, _____, and _____, with _____, and _____ being alternates to the committee.” *For elections, see LAPTA Toolkit: Elections and Nominating Committee.*

Bylaws Committee

- **At the Board of Directors meeting:** PRESIDENT: “_____, the chair of the Bylaws committee, will now present the report of the Bylaws committee.” CHAIR: “The Bylaws committee presents the following amendments to the Bylaws.” The chair reads each amendment by stating the Article, Section, and Item Number that is being amended, and reads the new Bylaw amendment. “By direction of the Bylaws Committee, I move that the Bylaw amendments be approved as presented.” Give the Secretary a copy of the amendments to place in the minutes. PRESIDENT: “It has been moved that the Bylaw amendments be approved as presented. This comes from committee so no second is needed. Is there any discussion? All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.
- **At the General Membership meeting** where 30-day notice to membership is given: PRESIDENT: “_____, the chair of the Bylaws committee, will now present the report of the Bylaws committee.” CHAIR: “The Bylaws committee presents the following amendments to the Bylaws.” The chair reads each amendment by stating the Article, Section, and Item Number that is being amended, and reads the amendments. PRESIDENT: “It has been moved that the Bylaws amendments be approved as presented. This comes from committee so no second is needed. Is there any discussion? All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.

Unfinished Business

The chair announces any business left unfinished at the previous meeting or business postponed to this meeting. Minutes of the previous meeting will indicate any unfinished business. If there is no unfinished business, the chair simply states, “there is no unfinished business.”

New Business

The chair calls for new business. Members may bring any new business before the membership if it is within the scope of the membership. A motion is necessary to introduce new items of business.

Program

The chair introduces the Program/Parent Education Chair, who presents the program or introduces the program presenter. If the program is not recorded in the minutes, you will have no official record of the activity. The meeting is not “turned over” to the Program Chair, nor does the Program Chair “turn the meeting back to the President.” The chair remains in control of the meeting from the call to order until adjournment. PRESIDENT: The chair can introduce the program or have the appropriate chair (parent education or programs) or officer introduce the program.

Announcements

The chair should, if possible, make all announcements. Announcements include the date of the next meeting, important events, and activities, etc. This may also be a good time to ask the principal to speak if they have not given a report earlier. PRESIDENT: “The chair has the following announcements: _____.”

Adjourn (Required)

The chair asks if there is any further business. If any additional business exists, it is handled at this time. If no further business exists, then the chair declares the meeting adjourned. No formal motion is necessary to adjourn. PRESIDENT: “Is there any further business? Hearing none, the meeting is adjourned at _____.”

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors of the PTA/PTSA 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 the Louisiana Congress of Parents and Teachers (LAPTA), for the protection of its integrity and its 501(c)(3) status, and for our protection, we, the undersigned officers, individually, 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. When a conflict of interest is declared, the Board members shall not use their personal influence of position to affect the outcome of a vote and shall leave the room during deliberations and the vote.
 - e. The **minutes of the meeting shall reflect if any conflict of interest was declared.**
 - f. Board members shall not:
 - i. Use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.
 - ii. Directly or indirectly use their current PTA position, the PTA name or organization for or against any specific candidate for elected public office, which is contrary to federal tax laws and the guidelines and policies of the PTA.

