



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 ten items which are detailed later in this section. Email the complete report by **October 28, 2022** to afiles@LouisianaPTA.org. Local PTAs that do not maintain Active Affiliation will be subject to the Retention Plan.

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 immediately. *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. *See Plan of Action Form at the end of this section.*
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 Units 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.

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 office@LouisianaPTA.org. It is recommended that you apply online for a new EIN with the IRS with a new PTA unit name. Complete the **New Local Unit Application Packet**.

ACTIVE AFFILIATION OVERVIEW

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. Email the completed report by October 28, 2022 to aafiles@LouisianaPTA.org. Local PTAs that do not maintain Active Affiliation will be subject to the Local PTA Retention Plan.

1. Completed Active Affiliation Cover Page.
2. Submit membership dues to LAPTA for all members with a minimum requirement of 30 members. Go to LouisianaPTA.org/membership and select *Submit Unit Dues*. Print the email confirmation of payment.
3. Submit to Louisiana PTA the name and contact information (address, phone number, and email) of at least the current Executive Committee members, plus all Board and Committee members and chairs within 15 days of election or appointment at LouisianaPTA.org/submit-officer-data-1.
4. First page of Bylaws (and Standing Rules, if applicable) showing the LAPTA approval stamp and approval date. Bylaws must be updated every three years. Visit LouisianaPTA.org/bylaws
5. Proof of annually filed and accepted IRS tax filing of Form 990 by November 15, or 5 ½ months after the close of the fiscal year
6. Local Budget Approval Form with the Approved Budget
7. Audit Committee Report for the previous year
8. Updated Articles of Incorporation with Louisiana Secretary of State at geauxbiz.com
9. Insurance Declaration page, if applicable
10. Proof of PTA Leadership Training for all officers at either the LAPTA Leadership Training or at PTA.org (Create a PTA.org account, go under *My Profile*, select *eLearning*, and download the eLearning certificate.)

Local PTA Retention Plan is initiated when a Local PTA does not maintain Active Affiliation.

- 1. Notification:** After the deadline passes to file the Active Affiliation Packet, LAPTA will notify the PTA of the actions required to obtain Active Affiliation Standing. The PTA will have 30 days, from the date of the notification, to meet all requirements to avoid moving into the Restriction Phase.
- 2. Restriction:** After 30 days without proper submission, the PTA has a second 30-day period to submit the report and are additionally not eligible for awards, programs, or grants administered by LAPTA or National PTA.
- 3. Restructure:** After 60 days without proper submission, 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 move into the Intervention Phase. If no Plan of Action is implemented, then the PTA will move into the Dissolution Phase after a reasonable amount of time. The PTA will continue to be ineligible for awards, programs, and grants administered by LAPTA and National PTA. *See Plan of Action Form at the end of this section.*
- 4. Intervention:** In the Intervention Phase, LAPTA assigns a support team to assist the PTA with their Plan of Action. If all requirements of the Plan of Action are not resolved by the agreed-upon date, the PTA will be moved back into Restructure Phase. With cause, LAPTA may place a Local PTA that has not met all Active Affiliation Requirements into the Intervention Phase early.
- 5. Dissolution:** A Local Unit is considered for revocation of their charter and loss of their LAPTA associated IRS 501(c)(3) nonprofit status if 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 Units 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.

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 office@LouisianaPTA.org. It is recommended that you apply online for a new EIN with the IRS with a new PTA unit name. Complete the **Reactivation of an Existing PTA**.



ACTIVE AFFILIATION COVER PAGE

DEADLINE: OCTOBER 28, 2022

Each membership year Local PTA Units must submit the following requirements to obtain Active Affiliation Status with Louisiana PTA and National PTA and to maintain IRS 501(c)(3) non-profit status.

Email the complete report to afiles@LouisianaPTA.org by **October 28, 2022**. Local PTAs that do not maintain Active Affiliation will be subject to a Local PTA Retention Plan.

Local Unit Name

Local Unit Parish

Local Unit LUR#

Local Unit President's Name

Local Unit President's Signature

President's Email

Date Emailed to afiles@LouisianaPTA.org

Required Items:

- Active Affiliation Cover Page
- Proof of submission of LAPTA membership dues (minimum of 30 members) at LouisianaPTA.org
- Board data submitted to LAPTA at LouisianaPTA.org/submit-officer-data-1
- First page of Bylaws showing the LAPTA approval stamp and approval date. Bylaws must be updated every three years. See LouisianaPTA.org/bylaws for details.
- Proof of 2020 IRS filing
- Local Budget Approval Form with the Approved Budget
- Audit Committee Report for the previous year
- Active Articles of Incorporation with Louisiana Secretary of State at geauxbiz.com
- Insurance Declaration page (strongly recommended)
- Email confirmation of PTA Leadership Training for each elected officer either through LAPTA or visit PTA.org for E-Learning and submit course completion certificates.

Contact office@LouisianaPTA.org with any questions.



ACTIVE AFFILIATION: PLAN OF ACTION

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

Local Unit Name	Parish	Local Unit LUR#	Date
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CHOOSE all that apply. Note the date for each item after speaking with LAPTA officer.

Active Affiliation Report was incomplete because:

- Active Affiliation Cover Page was not completed.
New deadline: _____ Emailed to LAPTA Date: _____
- A minimum of 30 LAPTA membership dues was not submitted.
New deadline: _____ Emailed to LAPTA Date: _____
- Board data was not submitted to LAPTA at LouisianaPTA.org/submit-officer-data-1.
New deadline: _____ Emailed to LAPTA Date: _____
- Bylaws are outdated.
New deadline: _____ Emailed to LAPTA Date: _____
- IRS taxes were not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- Local Budget Approval Form with the Approved Budget was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- Audit Committee Report was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- Active Articles of Incorporation with LA Secretary of State were not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- Proof of PTA Leadership Training for all elected officers was not filed.
New deadline: _____ Emailed to LAPTA Date: _____

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

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

Local Unit President's Signature	Date	Local Unit President's Name
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President's Email	President's Phone
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LAPTA Officer's Name

Email the completed form to afiles@LouisianaPTA.org.