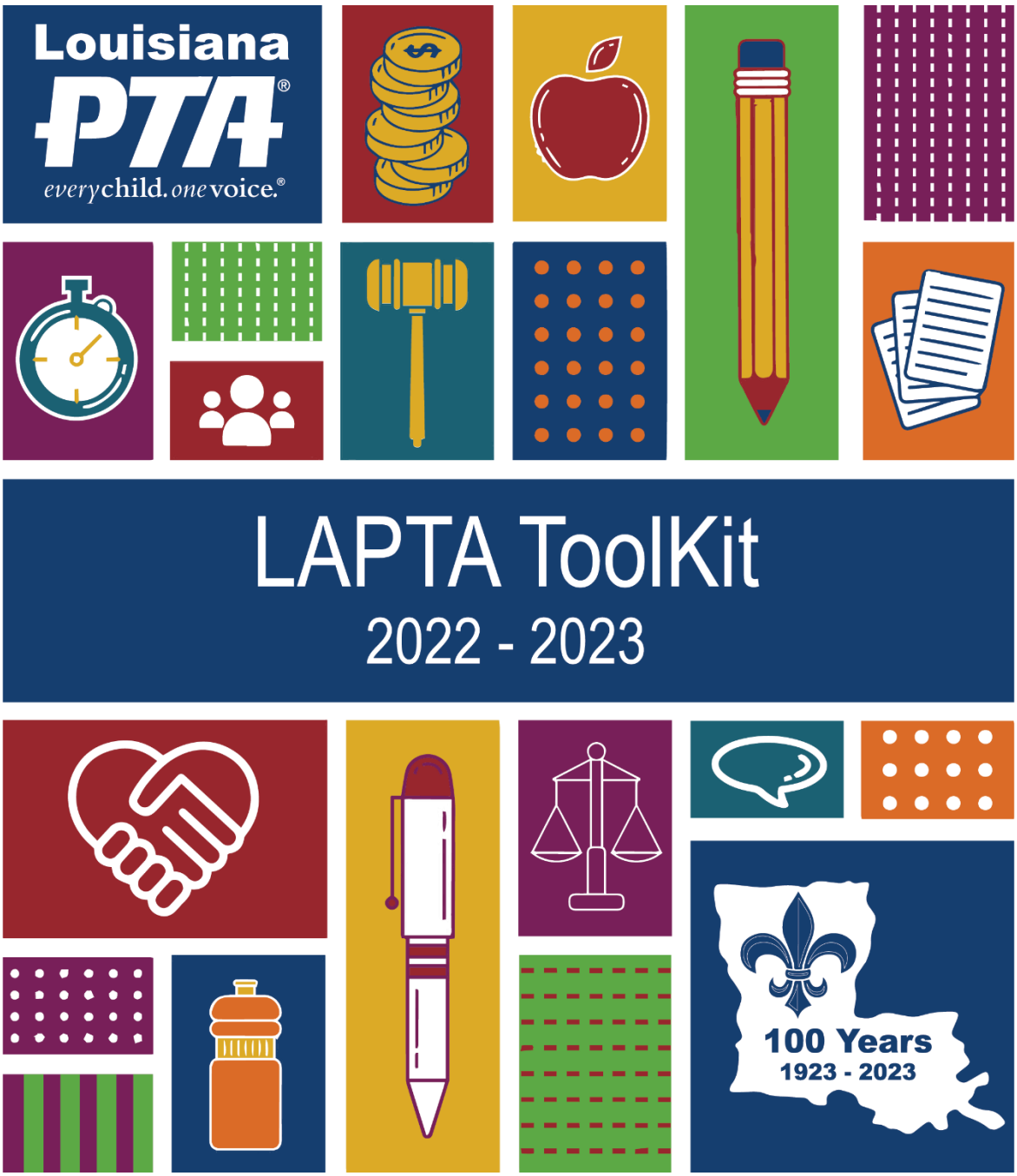


Louisiana PTA Toolkit

2022 – 2023

LouisianaPTA.org

INDEX

Louisiana PTA Office and PTA Basics, Section 1

Louisiana PTA Office ... 3
What does LAPTA Do? ... 3
LAPTA Board of Directors ... 4
LAPTA Dates and Deadlines ... 5
About National PTA ... 7
Procedure Binder & Email Protocol ... 8
Customize the PTA logo ... 8
Communications and Social Media ... 9
CheddarUp and MoneyMinder ... 11
What is Active Affiliation ... 12
Retention Plan ... 12
Reactivation Phase ... 12
Active Affiliation Report ... 13
Active Affiliation: Plan of Action ... 14

President, Section 2

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

Treasurer, Section 3

Introduction ... 4
Responsibilities of the Treasurer ... 5
Treasurer's Binder ... 5
Principles of PTA Financial Management ... 6
Budget ... 7
Banking and E-Commerce Policy ... 9
CheddarUp and MoneyMinder ... 12
Record Keeping & Retention ... 13
Articles of Incorporation ... 13
Reports ... 14
Raising Money ... 14
Insurance and Bonding ... 15
Audit Committee and Report ... 16
Federal Taxes ... 17
Sales Tax ... 19
Gifts to Schools ... 20
Additional Resources ... 20
Communications and Social Media ... 21
What is Active Affiliation? ... 23
Retention Plan ... 23
Reactivation Phase ... 23
Active Affiliation Report ... 24
Active Affiliation: Plan of Action ... 25
Inventory Accountability Form ... 26
Treasurer's Overview Checklist ... 27
Budget Approval Form ... 28
Sample Budgets and Comparison Reports ... 29
Year-End Financial Checklist ... 31
Deposit Form ... 32
Expense Form ... 33
Bylaws and Amendments Approval Form ... 34
Audit Report Form ... 35
Audit Procedures and Helpful Hints ... 36
Audit Worksheet ... 37
Sample Letter for NSF Check ... 38
PTA Monetary Donation to a School or District ... 39
Equipment Purchased by a PTA for Its Use ... 40
Donation Receipt ... 41
Passwords and Accounts Summary ... 42
Confidentiality, Ethics, and Conflict of Interest Policy ... 43

Secretary, Section 4

Importance of Secretary 4
Dates and Deadlines 5
Responsibilities of Secretary 7
Historian 8
Minutes 9
Motions and Elections 10
Content of Minutes 10
Records Retention 12
Secretary's Binder 12
Customize the PTA Logo 12
Communications and Social Media 13
Sample Agenda 15
Sample Minutes 16
Motion Form 17
Roster Sign-In Sheet 18
Confidentiality, Ethics, and Conflict of Interest Policy 19
What is Active Affiliation? 21
Retention Plan 21
Reactivation Phase 21
Active Affiliation Report 22
Active Affiliation: Plan of Action Form 23
Inventory Accountability Form 24

Board of Directors, Section 5

Dates and Deadlines 4
Being a Board of Directors Member 6
Quorum 7
Importance of Boardsmanship 7
Getting Started 8
Executive Committee 9
Committees 9
Committee Examples 9
Orientation Meeting 12
Virtual Meetings 12
Setting Goals 12
Finance for Board Members 13
How Boards Succeed 14
PTA Leadership Training 15
Procedure Binder 15
Communications and Social Media 17
PTA FAQs 18
Dos and Don'ts of Partnering with Administrators 19
Dos and Don'ts of Partnering with Teachers 20
Confidentiality, Ethics, and Conflict of Interest Policy 21
Bylaws Approval Form 23
Inventory Accountability Form 24
What is Active Affiliation? 25
Retention Plan 25
Reactivation Phase 25
Active Affiliation Report 26
Active Affiliation: Plan of Action Form 27

Membership, Section 6

Introduction 4
Membership Campaign Theme 5
Membership Dues 5
Membership Resources & 9 Reasons to Join 6
Create Your Own PTA Value Message 7
Getting Started 10
Membership Chair Duties 10
Membership Ask Note or Email 11
Procedure Binder 11
Monthly Challenges 12
Annual Membership Awards 12
Centennial Button Pins 12
Membership Graphics 13
Submit Membership Dues 14
CheddarUp and MoneyMinder 15
Membership Calendar 16
LAPTA Important Dates and Deadlines 18
Why You Should PTA 20
Communications and Social Media 21
Customize the PTA Logo 23
Membership Hashtag and Email Signature 23
Sample Membership Ask Email 23
Sample Membership Ask Note 24
Sample Membership Thank You Email 25
Sample Membership Thank You Note 25
Roster Sign-In Sheet 26

Advocacy, Section 7

Introduction to Advocacy 4
Gateway to Advocacy: Why Advocate? 5
Advocating on an Issue: Planning 6
Advocacy Strategy Chart 6
Setting Goals 7
Raising Public Awareness 7
Conducting Candidate or Issue Forums 8
Forum Timeline 10
Implementation: Developing Your Message 11
The Voice of Membership 12
Using the Media 13
How to Write a Press Release 14
Sample Thank You Letter to Legislator 14
Advocating with Your School Board 15
Communications and Social Media 16
Advocacy Award for Local PTA Units 18
Advocacy Awards for Students 19

Diversity, Equity, and Inclusion (DEI), Section 8

Introduction 4
Promote Diversity in Your School 5
Hold an Inclusive PTA Meeting 6
Organize and Inclusive PTA Event 7
Icebreakers 8
DEI Resources 9
Communications and Social Media 10

Elections and Nominating Committee, Section 9

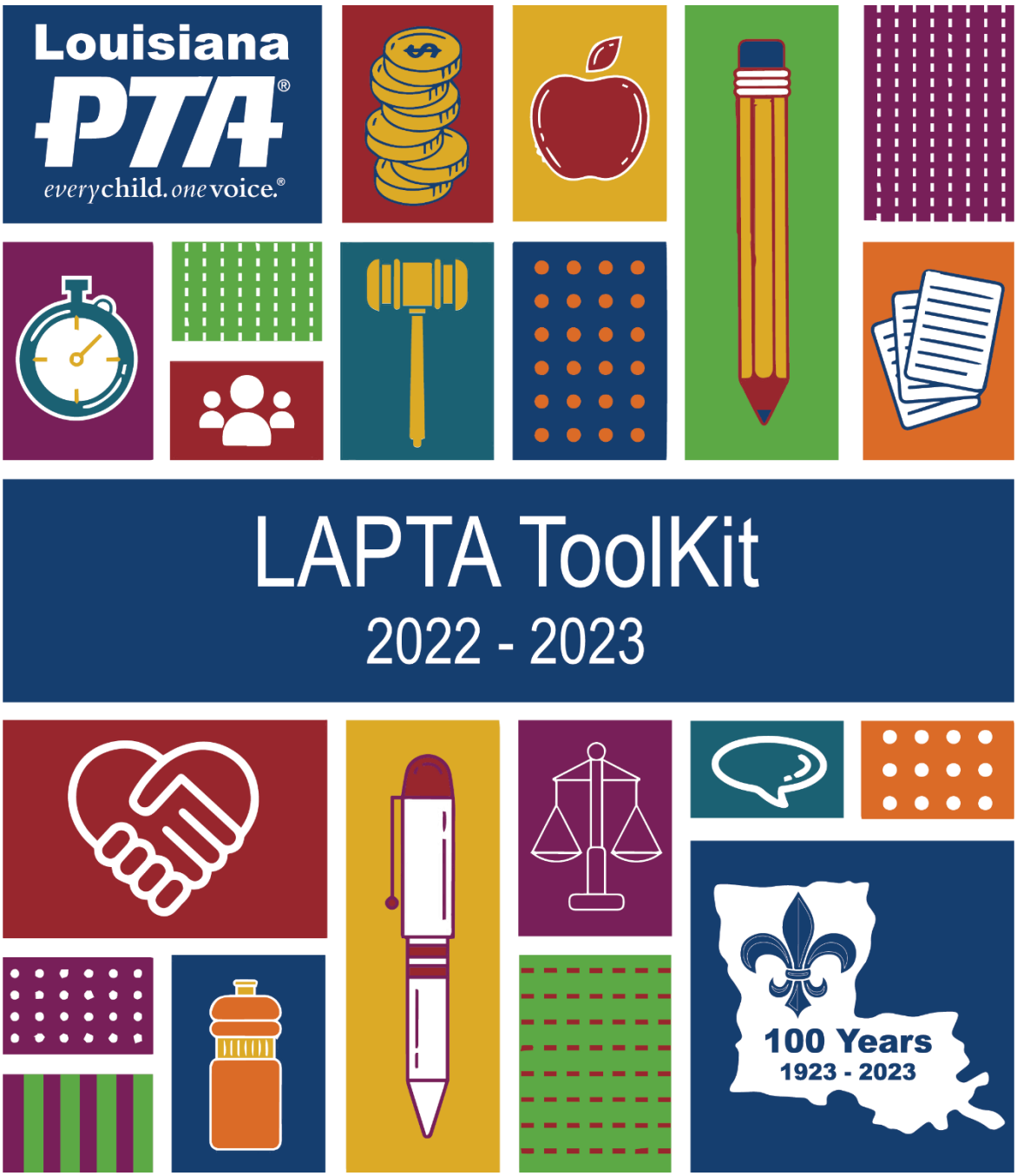
Nominating Committee 3
Elections 4
Script for Non-Contested Elections 5
Script for Contested Elections 6
Nominating Committee Report 7
Teller Committee Report 8
Confidentiality, Ethics, and Conflict of Interest Policy . 9

Bylaws, Standing Rules, and Articles of Incorporation, Section 10

Bylaws & Amendments: Updating & Approval 3
Bylaws and Amendments Approval Form 4
Instructions for Bylaws Template 5
Standing Rules 7
Articles of Incorporation 8

Awards, Grants, and Contests, Section 11

Monthly Membership Challenges 3
Annual Membership Awards 3
Centennial Button Pins 3
Safety Poster Contest & Sample Flyer 4
Love Louisiana Video Challenge & Sample Flyer 6
Reflections Theme Search Contest 8
Reflections Program 9
Outstanding PTA Newsletter Award 10
Advocacy Award for Local PTA Units 11
Advocacy Award for Students 12
Volunteer of the Year Award 13
Mentor-a-PTA Award 14
Apply for National PTA Grants 15
Top Grant Writing Tips 15
Louisiana PTA Grants Overview 16
$750 Reading & Literacy Grant Application 17
$750 Healthy Minds Grant Application 18
$500 LAPTA Day of Service Grant Application 19
$500 Creative Teacher Grant Application 20
$75 National PTA Legislative Convention Grant 21
$75 National PTA Convention Grant Application 22



LAPTA Office & PTA Basics
2022 – 2023
Section 1

INDEX

Louisiana PTA Office 3
What Does LAPTA Do? 3
LAPTA Board of Directors 4
LAPTA Important Dates and Deadlines 5
About National PTA 7
Procedure Binder 8
Email Protocol 8
Customize the PTA Logo 8
Communications and Social Media 9
CheddarUp and MoneyMinder 11
What is Active Affiliation 12
Retention Plan 12
Reactivation Phase 12
Active Affiliation Report 13
Active Affiliation: Plan of Action 14

LOUISIANA PTA OFFICE

All Local PTA Units in Louisiana are affiliates of Louisiana PTA (LAPTA) and National PTA. The Louisiana PTA Board of Directors serves as a resource and support for local units. Thank you for joining PTA as we work to make a difference in our communities. PTA focuses on making every child's potential a reality by strengthening education and taking a comprehensive approach to community success.

Louisiana PTA
1131 N. Causeway Blvd. Suite 306
Mandeville, LA 70471
LouisianaPTA.org
office@LouisianaPTA.org

WHAT DOES LAPTA DO?

- Advocates for children at the local, state, and federal levels.
- Makes every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Assists local units in building community through programs that promote student achievement, creativity, and inclusiveness.
- Ensures members of Louisiana Local PTA Units:
- Have the same purposes and principles as National PTA.
- Operate according to National PTA's vision, mission, values, and policies.
- Operate according to National PTA's legislative and advocacy priorities and adopted positions and resolutions.
- Aids the local units in maintaining compliance with National PTA, LAPTA, and IRS rules and requirements.
- Forwards the National PTA dues portion from Local PTA Units' dues submitted to LAPTA.
- Represents all Louisiana PTA members by participating in and voting at the National PTA Convention and National Legislative Convention.
- Hosts LAPTA Leadership Training in August and privately throughout the year for individual units as needed.
- Offers LAPTA grants to help fund Local PTA Units in providing engaging, educational, and fun opportunities for children, families, and communities.
- Assists PTA members if challenges occur in accomplishing the primary mission of their unit.
- Helps create new PTA units or reinstate unaffiliated units.
- Implements National PTA Reflections Program and selects and awards state winners.
- Collaborates with like-minded associations and coalitions supporting children, families, and educators in the state of Louisiana.
- Member of Louisiana Partnership for Children & Families.
- Member of VoterVoice legislative platform.

LOUISIANA PTA BOARD OF DIRECTORS

The LAPTA Board of Directors is made up of volunteers from Local PTA Units across the state. There are volunteer positions currently available. If you are interested in serving at the state level, contact Kayla Pagel.

President: Kayla Pagel, president@LouisianaPTA.org
Serves as the official contact, communicator, and representative of LAPTA. Works with other PTA leaders and other like-minded state organizations to connect families, schools, and community to support student success.

Treasurer: Beth Maillho, treasurer@LouisianaPTA.org
Maintains full account of funds of the association.

Secretary: (Open)
Records and maintains the minutes of all meetings of LAPTA.

VP of Advocacy: Kaionnia Scott, advocacy@LouisianaPTA.org
Promotes national and state advocacy and legislative programs and activities.

LAPTA Historian: Mallory Pell, historian@LouisianaPTA.org
Prepares and updates record of the activities and achievements of LAPTA.

Communications Committee Chair: (Open)
Creates distinctive and credible messaging for LAPTA on social media platforms.

VP of Diversity, Equity, and Inclusion: (Open)
Promotes inclusion, engagement, and full involvement of diverse populations of LAPTA.

VP of Affiliation: (Open)
Oversees approval of the Bylaws and compliance with Local Unit Active Afflation. All work is done through email.

VP of Arts Education: (Open)
Promotes the importance of arts on education and facilitates opportunities for Louisiana students to engage in and be exposed to a variety of art forms.

VP of Membership: (Open)
Oversees membership initiatives focused on recruitment and retention.

VP of Leadership Development: (Open)
Promotes resources, tools, and programs that support effective and ethical PTA leadership and growth.

Centennial Celebration Special Committee: (Open)
Oversees the LAPTA State Meeting and Centennial Celebration on March 24 & 25, 2023.

Spanish Translation Committee: (Open)
Translates the Bylaws template and other files to Spanish.

To apply for a position, visit https://form.jotform.com/221844836900054 or scan the QR Code.

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
July 25 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
July 25 Submit new membership dues at LouisianaPTA.org/membership

August 2022

August 1 Reflections Program opens at LouisianaPTA.org/reflections-program
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
August 25 Submit new membership dues at LouisianaPTA.org/membership
August 27 LAPTA Leadership Training North for northern Local PTA Units
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: 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

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

November 2022

November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
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
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

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 NPTA 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 NPTA 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

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.

PROCEDURE BINDER

A Procedure Binder is one of the most important basic tools in PTA work and is often the least used. LAPTA strongly urges all local units' officers and chairs to maintain an accurate and complete Procedure Binder for all work of the PTA. Since most new recruits have little or no experience on the job, the binder helps to identify the task and chart a course of action. A Procedure Binder tells of the history of the PTA and what the position entails. It is an up-to-date record that gives a foundation on which to build. If an officer or chair has not received a binder from their predecessor, now is the time to start one. Procedure Binder is the property of the PTA and not of the person who is using it.

A loose-leaf binder with dividers is essential. If materials will not fit in the binder, use an expandable folder. Each binder may be used for more than one year and be updated by the current user. Procedure Binders should contain calendars of school district, PTA events, LAPTA deadlines. Include resource materials such as the Bylaws, Standing Rules, approved budget, Board roster, summary of any passwords and accounts, Expense and Deposit Forms, and information from National PTA and LAPTA. Report, agendas, and minutes from all meetings should be included. Everything should have a place in the Procedure Binder.

EMAIL PROTOCOL

It is recommended that local units should create PTA email accounts for the Board which are handed down to successors. The use of personal accounts is discouraged. Passwords and accounts need to be known by the President and at least the Secretary.

When sending emails to a large list of people, use an email service such as MailChimp which is free. This way the recipients do not see everyone else's email address and it is a convenient and organized.

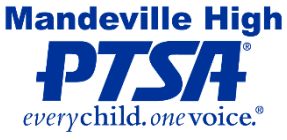
Email as a means of communication is subject to the same professional standards used in writing a letter or speaking as a PTA representative. Be careful what is said. Always include names, proper openings, closings, and "PTA" in the subject heading. Use the tagline *every***child**.*one***voice**.© Email is not to be used for discussing details of sensitive issues that relate to an individual's removal from office, hearings, or investigative meetings. Copy the President and/or Vice-President when appropriate and obtain the approval of the President if the email is considered important or being sent to many members.

Keep messages short when possible. Proofread the email and check for tone. Respond to email as soon as possible but not later than 3-5 days. If sending an attachment with the email, always include a message in the body of the email. Email should be courteous, concise, clear, communicate the message, have a cooperating tone, and spell checked.

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*every***child**.*one***voice**). 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. Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

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



COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

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 w 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. 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 Deposit Form.

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

CheddarUp has the Basic entry level account that is free. If you plan to sell items such as tshirts 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

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.

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 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.

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*. Print 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 aafiles@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 _____

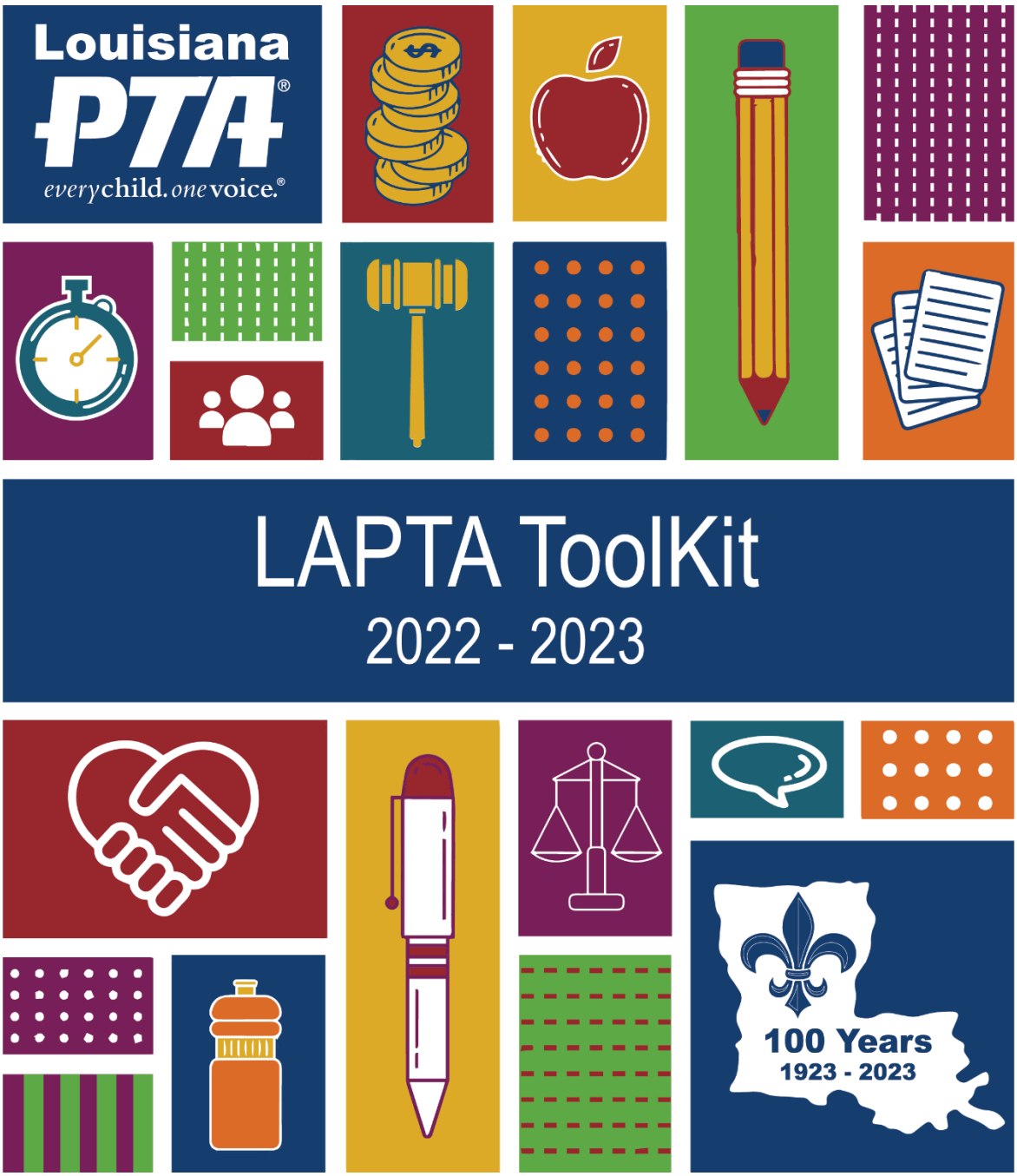
CHOOSE all that apply. Note the date for each item after speaking with LAPTA officer. Active Affiliation Report was incomplete because:

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



President

2022 – 2023

Section 2

INDEX

About National PTA 3
Leadership Traits 4
Important Documents and Terms 4
Essential Knowledge 5
Important Dates and Deadlines 6
Getting Started 8
Building Your Board of Directors 9
Pick Your PTA Programs 10
PTA Leadership Training 10
Finances 11
CheddarUp.com and MoneyMinder.com 12
Communications and Social Media 13
Membership 15
LAPTA Centennial Button Pins for Members 15
Customize the PTA Logo 15
Meeting Types 15
Elements of Successful Meetings 16
Agendas 17
Parliamentary Law 18
Problem Solving 19
President's Duties Checklist 20
Dos and Don'ts of Partnering with Administrators 22
Dos and Don'ts of Partnering with Teachers 23
President's Binder 24
Sample Passwords and Accounts Summary 24
Fundraising Strategies 25
Year-End Checklist and Transition Guidance 26
Inventory Accountability Form 27
What is Active Affiliation? 28
Retention Plan 28
Reactivation Phase 28
Active Affiliation Report 29
Active Affiliation: Plan of Action 30
Icebreakers 31
Sample Agenda 32
Sample Meeting Script 33
Confidentiality, Ethics, and Conflict of Interest Policy 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
July 25 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
July 25 Submit new membership dues at LouisianaPTA.org/membership

August 2022

August 1 Reflections Program opens at LouisianaPTA.org/reflections-program
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
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

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

November 2022

November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
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
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

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.

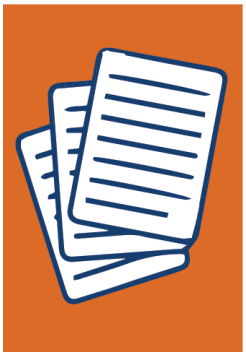
Financial Check Up

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 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.

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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 (*every***child**.*one***voice**). 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. 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 "*every***child**.*one***voice**."

Mandeville High PTSA
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.

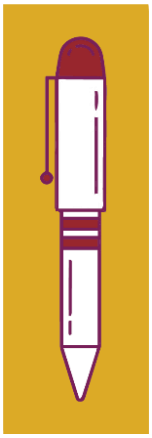
Virtual meetings are allowed. For General Membership meetings, the first of the year and election meetings must be in person. For Board meetings, the first of the year meeting plus one other meeting must be in person. Virtual meeting guidelines are listed in the Bylaws. Meetings may be recorded by one 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 to 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
Moneyminder.com: email & password
CheddarUp.com: email & password; ABCPTSA.CheddarUp.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.

INVENTORY ACCOUNTABILITY FORM

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

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

Quantity	Value	Name	Item Description	Note

Number of pages of Inventory Accountability Form: Page _____ of _____ total pages.
We agree to the findings of this Inventory Accountability Form:

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

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

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 aafiles@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 — AGENDA

January 19, 2022 — *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

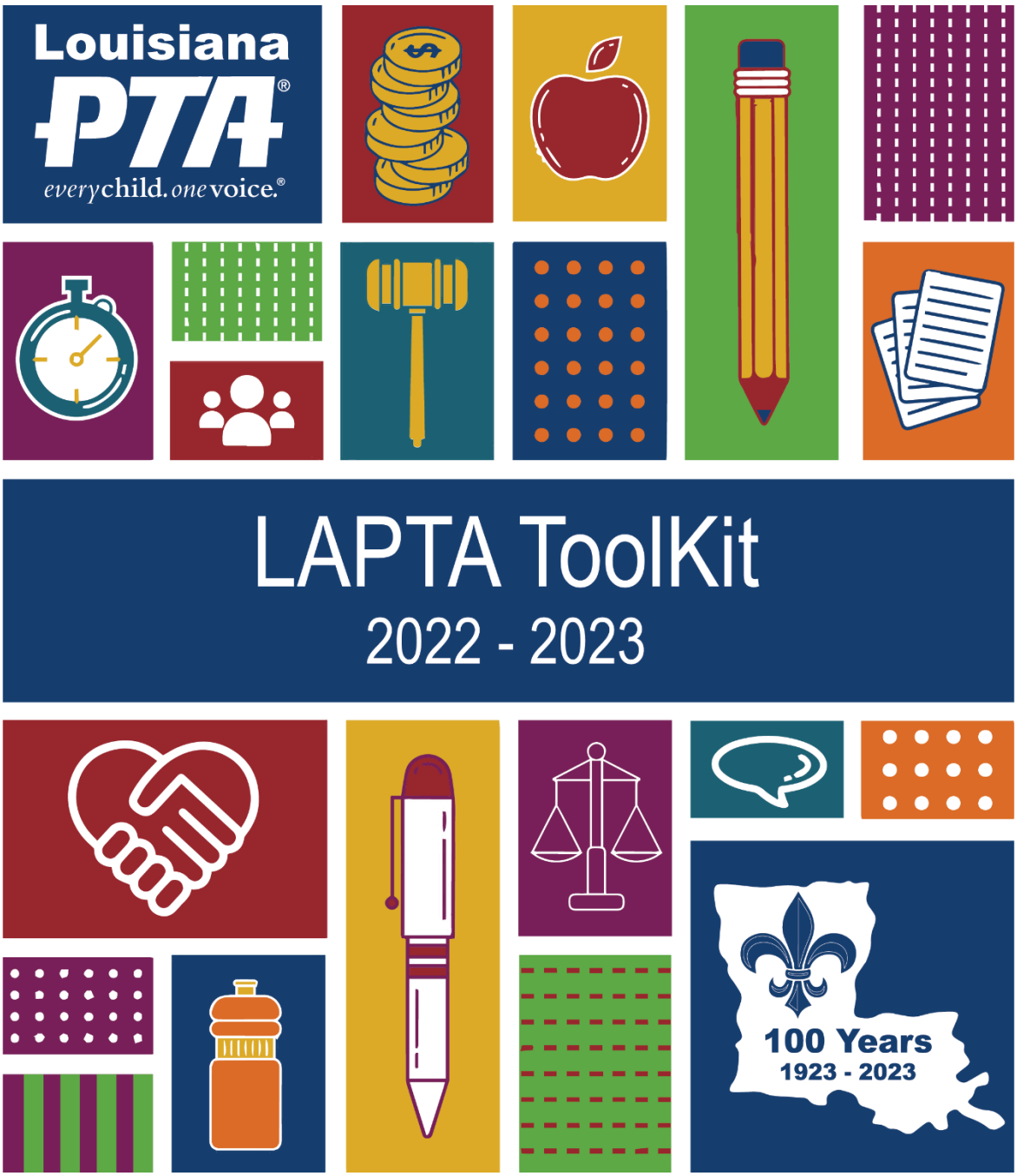
Members of the Board of Directors of the PTA/PTSA serve in a **fiduciary capacity** and owe a **duty of care**, a **duty of obedience**, and a **duty of loyalty** to the PTA. Board members shall conduct themselves with **integrity** and **honesty** and act in the **best interests** of the PTA. Disclosure 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.

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

Date	Board Member Name	Position	Signature



Treasurer

2022 – 2023

Section 3

INDEX

About National PTA 3
Leadership Traits 4
Introduction 4
Responsibilities of the Treasurer 5
Treasurer's Binder 5
Principles of PTA Financial Management 6
Budget 7
Banking and E-Commerce Policy 9
CheddarUp and MoneyMinder 12
Record Keeping & Retention 13
Articles of Incorporation 13
Reports 14
Raising Money 14
Insurance and Bonding 15
Audit Committee 16
Federal Taxes 17
Sales Tax 19
Gifts to Schools 20
Additional Resources 20
Communications and Social Media 21
What is Active Affiliation? 23
Retention Plan 23
Reactivation Phase 23
Forms
- Active Affiliation Report 24
- Active Affiliation: Plan of Action 25
- Inventory Accountability Form 26
- Treasurer's Overview 27
- Budget Approval Form 28
- Sample Budgets & Comparison Reports 29
- Year-End Financial Checklist 31
- Deposit Form 32
- Expense Form 33
- Bylaws and Amendments Approval Form 34
- Audit Report Form 35
- Audit Procedures & Helpful Hints 36
- Audit Worksheet 37
- Sample Letter for NSF Check 38
- PTA Monetary Donation to a School or District 39
- Equipment Purchased by a PTA for Its Use (Stored at School) 40
- Donation Receipt 41
- Passwords & Accounts Summary 42
- Confidentiality, Ethics, and Conflict of Interest Policy 43

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 Treasurer, 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

INTRODUCTION

The Treasurer is the authorized custodian of the funds of the PTA. The President, who bears full responsibility for the affairs of the unit, and Board members, who have a fiduciary responsibility to the PTA, should have a good understanding of all financial matters. The Treasurer receives and disburses all monies as prescribed in the Local Unit Bylaws, the adopted budget, or as authorized by action of the PTA. Through adoption of the budget, the membership determines how all PTA funds will be earned and spent. If all money is received and spent within the rules set by the PTA Bylaws, the budget, and the IRS, the chances that you will have problems decrease dramatically.

A unit's money does not belong to the Treasurer. Even if the Treasurer does not agree with the membership's decisions about the budget, he must follow the will of the organization. Additionally, the financial records are the property of the PTA, not an individual officer. A Treasurer shall turn all records over to their successor or to an Audit Committee. Many units move thousands of dollars through the PTA account. For the protection of both the PTA unit and the Treasurer, it is important that funds be managed in a manner that allows every dollar to be traced. Some requirements might seem tedious, but it is time well spent.

Familiarize yourself with **LouisianaPTA.org/treasurer**. This is important! If you need assistance or have any questions, contact Beth Maillho, LAPTA Treasurer, at treasurer@LouisianaPTA.org.

RESPONSIBILITIES OF THE TREASURER

- Register as a PTA Leader at LouisianaPTA.org/submit-officer-data-1.
- Sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Study and know the PTA Bylaws, Standing Rules, and LAPTA Toolkit: Treasurer.
- Attend LAPTA training; if possible, attend National PTA trainings and conventions.
- Change signatures on all bank accounts. Use the school's mailing address for the account.
- Function as sole custodian of the checkbook.
- Maintain the Treasurer's Binder with all required financial documents. See suggested tabs in the following section.
- Chair the Budget Committee.
- Present the proposed budget for approval by majority vote at the first General Membership meeting.
- Receive all monies and deposit them in a timely manner. National PTA suggests one day.
- Make disbursements with a check or debit card as authorized by the PTA in accordance with the budget.
- Keep an accurate and detailed account of all monies received and disbursed.
- File the annual IRS taxes or hire a professional to file the annual taxes. Most PTA fiscal years end on June 30 with taxes due 4 ½ months later which is November 15.
- Renew the annual Articles of Incorporation with the Louisiana Secretary of State at geauxbiz.com.
- Renew the annual insurance policy.
- Reconcile all accounts monthly.
- Submit a budget report at all Board and General Membership meetings.
- Make an annual budget report to the PTA.
- Prepare the Treasurer's Binder with the Year-End Financial Review Checklist.
- Present to the Audit Committee all materials necessary for the review.
- Purchase PTA memberships monthly from LAPTA at LouisianaPTA.org/membership.
- Recruit new PTA leaders and PTA members.

TREASURER'S BINDER

It is particularly important to keep an organized and up-to-date binder, which should include the following, separated by tab dividers.

- Accounts & passwords summary sheet; Board roster
- Completed expense forms and receipts
- Completed deposit forms
- Monthly bank statements and reconciliation reports
- Approved budget, Budget Approval Form, monthly budget reports
- All agendas and minutes from Executive Committee, Board of Directors, and General Membership meetings
- Charter information such as IRS tax filings, Bylaws, Standing Rules, LAPTA Toolkit: Treasurer plus Sections 1, 5 and 10, Secretary of State Articles of Incorporation Annual Report, insurance policy, and past Audit Reports
- Miscellaneous papers, including correspondence
- Receipt book to acknowledge cash received (not necessarily in the binder)
- Checkbook to disburse funds as authorized (not necessarily in the binder)
- Record of all debit cards and their account numbers

PRINCIPLES OF PTA FINANCIAL MANAGEMENT

All PTA funds must be deposited directly in the PTA's bank account, never in a personal, school, or other organization's account.

Each Local PTA Unit is an independent 501(c)(3) organization that collaborates closely with its supported school. PTA funds are considered, by law, to be private funds donated or raised by the membership and deposited for the exclusive use of the organization. School accounts consist of public funds generated through taxes and distributed to the schools via legislation or other acts of government. The school is, therefore, accountable to the public for the expenditure of its funds. Funds raised by the PTA belong exclusively to the membership. They are not reportable as are public funds except to the membership of the Local Unit. PTAs are not required to provide financial reports to the school administration or school board. Therefore, all PTAs must maintain separately controlled accounts that are under the direct control of the PTA and its Board of Directors. School officials have no control over PTA funds except to the extent that a PTA works in cooperation with the principal to determine school needs and PTA assistance in meeting those needs.

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

The proposed budget must be approved at the first General Membership meeting of the year. Until then, PTAs may only spend the amount of money listed in the previous year's "Startup Funds" line item. Every budget must have a line item for Startup Funds to allow for purchases prior to budget approval. Any additional proposed expenditure or fundraising project not provided for in the approved budget must be presented to the PTA for approval before proceeding with the project or payment.

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

Local Units are required to submit member dues to LAPTA at $3.50 per member per year. LAPTA then pays National PTA $2.25 per member per year. These funds submitted to LAPTA are not to be calculated as gross income on the IRS tax filing. Only report the "net" income from member dues on your tax report. However, the Local Unit **budget** will reflect the actual gross and net income for dues. For example, a PTA collected 100 memberships for $750. The PTA then submitted 100 membership dues to LAPTA for $350. The net income from membership dues is $750 - $350 = $400. On the IRS filing, record only $400 as dues income.

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

A check can be written in advance with everything filled in but the amount. Proper documentation is required as with any expenditure. Never write a check to "cash." The check should be made payable to the person or business responsible for the fund.

Always have two people sign every expenditure.

All Bylaws require two signatures to authorize every purchase. Individuals authorized to sign checks may not be related to each other by marriage or any other relationship nor should they be a part of the same household. Local Units may use debit cards issued only to those authorized on the bank account if every purchase is properly documented with receipts and two signatures.

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

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

Pay bills with a check or debit card. Never pay with cash. PTA credit cards are not allowed.
Bond all officers and chairs who oversee money to protect the PTA's assets.
Always have deposits counted and signed by two people.
Always issue a receipt for cash received.

BUDGET

The budget is a financial guide that outlines estimated income and expenditures based on the Local PTA Unit's goals. To be effective, the budget must determine what realistic expenses will be for the year and how to secure the necessary funds to meet these disbursements. The budget should cover your fiscal year which is a 12-month period. The Bylaws specify a unit's fiscal year with most units starting on July 1 and ending on June 30.

It is important to note that while PTAs help raise significant resources for schools and children, fundraising is not part of the primary mission of PTA, which is **to make every child's potential a reality by engaging and empowering families and communities to advocate for all children**. PTAs fundraise to support the vital programs and services on campus that support student learning and family engagement. A unit should raise only what is needed to meet expenses. Money raising activities should not absorb so much time, thought, and effort that other projects are neglected and the attention of members is diverted from the purposes of PTA.

It is better to overestimate income rather than underestimate. All budgets must include a **Startup Funds** line item to allow for purchases to be made before the General Membership has approved the new budget. Once the budget is approved, the Local Unit Budget Approval Form must be completed and sent to LAPTA as part of the Active Affiliation Packet.

The Budget Committee

The Treasurer is the chair of this committee. Composed of three to five members, it has the responsibility for developing a proposed budget. Members might include the past and current President, past Treasurer, Financial Resources Chair, and the principal. The Bylaws specify if members are elected or appointed.

To develop the budget, the committee should review the previous year's budget and Treasurer's reports to make recommended changes; gather information from officers and committee chairs about their planned activities and financial needs; and consider sources of funds to meet these requirements. If a unit has identified programs or projects to conduct, it might want to budget expenses first. Knowing the expense figures helps determine how much revenue is needed. Or a unit can budget revenue first and then determine its programs and projects.

Creating a Budget

In every budget, total income must equal total expenses. There should be a line item for every major category or event. It should be simple but detailed to permit all income and expenses to be correctly categorized. The following template works well with MoneyMinder.com and *is only a suggestion. See sample budget later in this section.*

- Create a main ***Fundraising*** section and list each event's gross income and the expenses resulting in the net income such as a Fun Run, Gumbo Cook-Off, Shake Days, grants, general donations, and uniform sales.
- Create a ***Student and Parent Programs*** section and its items such as PBIS support, mental health speaker, honor roll events, Santa & Hot Cocoa Night, Grandparents Bingo, newsletter, STEM Night, and more.
- Create a ***Teacher, School, & Community*** section and list its items such as Staff Welcome Lunch, Staff Snack Days, Winter Break Coffee and Muffins, Staff Appreciation Week, Playground Equipment, and more. Hospitality should not exceed 5% of the budget and should only include *Welcome Committee* type expenses. Teacher lunches and events should each have their own line item. **LAPTA also offers a Mentor Program** where a strong, healthy PTA mentors a smaller, Protected, or new PTA unit that needs a helping hand with guidance support and/or by donating $1000. To join, email president@LouisianaPTA.org.
- Create an ***Administration*** section for items such as PTA membership dues, insurance and bonding, Articles of Incorporation renewal, subscriptions like Zoom, CheddarUp.com, MoneyMinder.com, and website, leadership training with LAPTA and National PTA, bank fees and interest, copies, postage, ***required*** **Start Up Funds**, Carry Forward & Ending Balances, a small Miscellaneous line item (<$1000), and more. Start Up funds are the only amount that may be used prior to budget approval. Once the budget is approved by the General Membership, these expenses should be applied to the appropriate line item in the budget. The **Carry Forward & Ending Balances** can be more than the Start Up Funds. You don't have to spend all of the money each year (beyond the Start Up Funds.) Email Treasurer@LouisianaPTA.org with questions.

Scholarship & Mission Fund
PTAs may choose to have a Scholarship and Mission Fund. Objectivity and equal access are the most important issues to consider when awarding scholarships to students, teachers, or other PTA units. Procedures determining how the committee is formed and how recipients are selected should be in writing. No one should serve on the committee if he or she has a child or relative applying. The source of funds for scholarships might be a **Mission Fund** for which the PTA solicits contributions. A Mission Fund may take many years to build to a sufficient level to fund scholarships, grants, and special projects. This is allowable if the PTA has a written plan of its intentions and follows this plan. Donors need to be made aware of the status of the plan prior to contributing. A 1099-MISC is not required for scholarships. Recipients need to be informed that any portion of the funds received not used for school fees such as tuition, books or lab fees is taxable income. Beyond making the scholarship recipient aware of this issue, a PTA unit has no further obligation.

LAPTA also offers a Mentor Program where a strong, healthy PTA mentors a smaller, Protected, or new PTA unit that needs a helping hand with guidance support and/or by donating $1000. To join the program as either a mentor or mentee (the one in need), email president@LouisianaPTA.org. To apply for the Mentor-a-PTA Award, go to LouisianaPTA.org/awards.

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.

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

Budget Approval
The Treasurer presents the proposed budget to the Board of Directors for consideration. The Board of Directors does not have to take a vote of approval on the budget. The budget is reviewed by the Board of Directors to make sure all committee expenses have been included. The proposed budget is then presented to the General Membership for approval at the first General Membership meeting of the year. The budget should be presented item by item to allow for discussion and amendment. A verbal majority vote is required for adoption. **Without an approved budget, the unit can only spend the Startup Funds.**

Amending the Budget
Because the budget is only an estimate of the planned expenditures and income for the year, amendments might be necessary. Amendments can be made at any General Membership meeting or special meeting called for that purpose. A majority vote with 20-day previous meeting notice, or two-thirds (2/3) vote with no meeting notice, is required to pass the amendment.

BANKING & E-COMMERCE POLICY

Local PTA Units may utilize electronic commerce to receive and spend monies. See detailed policies below. There are many options such as CheddarUp.com and SquareUp.com. MoneyMinder.com partnered with CheddarUp.com and offers cost-effective Team Edition store front for free if you use MoneyMinder.

Employer Identification Number (EIN)
An IRS Employer Identification Number (EIN), also known as a Federal Tax Identification Number (TIN), 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. LAPTA requires each PTA to apply for an EIN when it organizes. This number is used on all bank accounts and tax returns. Never use an individual's Social Security Number to open a bank account. Some online processing businesses and the application for an EIN do require a personal Social Security Number.

Authorized Signatures
Acquire signature forms from a bank for checking and any other accounts. The Treasurer must be listed on the forms to be authorized to sign checks and withdraw funds. Only current elected PTA officers have the authority to sign checks. Three people are required as signers on the checking account. Check signers are not allowed to sign a check payable to themselves. All PTA checks should require two signatures. **A school employee may have signing authority on a PTA account ONLY if they are an elected officer of the PTA**.

Checking Account
Every unit will have its own bank account. Banks require an EIN, Articles of Incorporation, and minutes from the election of the Board, plus other possible documentation to open an account. Never use an individual's Social Security Number to open a PTA account. Each unit must have its own EIN. Local Units cannot use a school or school district's EIN. To acquire an EIN, search online for "Apply for an IRS EIN" and follow the link to the IRS.

Savings Account
A unit may have a small contingency savings account to maintain financial stability. As a guide, the amount in the account should not exceed one-half of the unit's budget for an average year.

Debit Cards are issued only to authorized signers on the bank account and must include the name of the PTA. The Treasurer logs who has a debit card and its account number. Cash transactions (ATM, cash back, etc.) are not allowed. Credit cards are not allowed. Prior to use of the debit card, an Expense Form is completed with two signatures and submitted. Following the purchase, the receipt is given to the Treasurer and attached to the Expense Form. A change in signer on the checking account requires the previous debit card to be destroyed. The minutes shall reflect the approval of debit cards for the PTA and shared with the bank.

Recurring payments for PTA expenses are allowed to be deducted directly from the bank account with properly documented Expense Forms using a debit card or e-check.

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

Venmo and Zelle are NOT allowed because it is a peer-to-peer platform. Individualized reports are not available. They do not have the same high standards and regulations as federal banking rules. The use of Venmo is not covered by insurance and bond policies, leaving the PTA vulnerable to fraud and theft. **PayPal is currently allowed**.

All deposit transfers must occur at least monthly and use a Deposit Form. One Deposit Form can be used for multiple transactions. When accepting credit card payments for PTA business, know the payment collection's

policies on handling cards that do not read correctly. Do not write down card numbers for any reason. Accept only those transactions that are immediately authorized. The PTA does not record account numbers for future settlement.

For electronic payment disputes, the PTA should research the payment collection system's policies on challenging a disputed payment. Only the Treasurer may issue a refund to the customer. Respond to any challenge of payment promptly and accurately. Confirming a refund requires the same approvals and documentation as required for an Expense Form. Record the authorized refund in the check registry prior to withdrawal. Withhold goods and services until the dispute is cleared. Treat disputes in the same manner as a non-sufficient funds check.

Deposits

It is important that the Treasurer receive all funds for the PTA and promptly deposit them into the PTA's bank account. National PTA recommends depositing funds within one day. One should only manage PTA funds and may not deposit funds of other organizations into the PTA account. A signed Deposit Form shall accompany each deposit with two signatures required for cash deposits. The Deposit Form is included in the forms section.

Two people shall count all deposits. The chair turning over the money keeps a copy of the Deposit Form or may request a receipt from the Treasurer for their records. The Treasurer should not keep cash in their car or home. The deposit should be made the day of collection. If a large amount of money is to be collected at a time when the banks are not open, arrangements should be made to make a night deposit or kept in the school safe. Prior to placing money in the school safe, it must be counted by two PTA Board members. Document the amount and sign. After making a deposit, the Treasurer should attach a copy of the deposit slip, the bank receipt, and copies of deposited checks if possible.

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

PTA sponsorships may be offered by local PTAs in return for intangible benefits. For example, for a $250 sponsorship, a PTA may include a company's logo and name in their monthly newsletter, on a banner hung on the school fence, or in a post on a social media site. PTAs often provide tiers of sponsorships based on donation levels. The guidelines for sponsorships mirror the Noncommercial Policy and Co-Venturing Guidelines.

Donors And Charitable Contributions

PTAs must be prepared to issue receipts for contributions made, regardless of the amount or value. Canceled checks are not sufficient. There is no required format for the receipt, and Social Security Numbers are not required. At a minimum, the receipt must reflect the donor's name, date, cash amount received or a description of the property received (but not the value), a statement that no goods or services were provided by the organization in return for the contribution, and the PTA's name. If a donor receives the value of goods or services for the donation, only the portion in excess of the value is deemed a donation. A description and good faith estimate of the value of goods or services that an organization provided (if any) in return for the contribution must be included in the written acknowledgment. A donor cannot claim a deduction of $250 or more unless the donor obtains a written acknowledgment of the contribution. Sample Donation Letter is at the end of this section.

PTAs are required by IRS disclosure rules to inform prospective donors about the extent to which their contributions are legally tax-deductible. If a PTA holds a fundraising event that provides a meal or some tangible item in return for the purchase of a ticket, then the portion of the ticket that is tax-deductible is the ticket price less the fair market value of the meal or item received. For example, if a spaghetti supper ticket sells for $20 and the value of the meal is determined to be $5, the purchaser is entitled to a $15 charitable contribution deduction. The $5 is not the cost to the PTA, but the value of a prepared and served meal allowing for a reasonable profit.

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

Gift Cards or Certificates
Any gift cards or certificates purchased by a PTA should not exceed $25 each in value and must be retail-specific (branded cards of restaurants, stores, etc.). Generic cards like a MasterCard or Visa gift card are not permitted. Gift cards are cash equivalents, so PTAs should exercise the same care when storing and distributing gift cards. If a gift card is donated to the PTA for the purpose of subsidizing PTA expenses, complete a PTA Expense Form.

Field trips are a wonderful way to give back to your school community. However, whether the field trip is the PTA's event or the PTA gifts money to the school for a field trip, you could face liability. Gifting money to the school significantly reduces liability but is no guarantee the PTA will not be held liable. Contact your insurance provider to review the insurance coverage.

PTA Membership Dues
Local Units must submit dues of $3.50/member to LAPTA, which includes the National PTA and LAPTA dues portion. According to the IRS, the National PTA and LAPTA dues portions never belong to a Local Unit. They should not be included in the budget as money to be spent for budget planning purposes. They are also not included in the gross receipts when reporting income to the IRS. Dues paid to LAPTA are excluded from the IRS tax filing.

Local PTA Units are an affiliation of National PTA and Louisiana PTA which have a membership structure. When the local member at the school submits PTA dues, the Local 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. Dues are submitted to LAPTA through CheddarUp.com. E-checks are the preferred payment method. Submit unit dues at **my.cheddarup.com/c/collect-local-unit-dues**. LAPTA does not provide paper membership cards. The template for membership cards is available at LouisianaPTA.org/membership. PTA memberships are sold to individuals. If a PTA wishes to sell family memberships, it must collect enough to cover the state and national portions of $3.50 *per person* in the family. For this reason, family memberships are discouraged.

Bank Statements & Reconciliation
The PTA's permanent mailing address for bank accounts is the school's address. All bank statements must be physically signed by a person who is not authorized on the account. Reconcile the bank statement each month and compare with the register balance to ensure that bank and financial records are correct. After reconciliation, present the report at PTA meetings for review and file the report in the Treasurer's Binder. For the protection of the PTA, it is recommended that a Board Member who does not sign checks also reconciles the bank statement.

MoneyMinder.com is a financial site that works with non-profits and is used by LAPTA. It makes the transition between old and new Treasurers much easier, keeping all banking information easily accessible from year to year. The cost of $179/year must be included in the budget.

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

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 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..

RECORD KEEPING & RETENTION

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

When using either written or computerized accounting, regular financial reports are required. The actual versus budget comparison reports must be produced for every Executive Committee, Board of Directors, and General Membership meeting. Each report generated must show the title and date. MoneyMinder has an edit box to add a title and date. Make copies of the files on a regular basis, preferably any time that the records are modified but at no greater interval than one month. Store at least one set of backup records away from the Treasurer's computer system such as another officer's home or the school. Keep the PTA financial records on a memory flash drive containing only PTA financial information. Written financial records or computerized ledger should maintain the running balance in the account. Follow these record retention guidelines:

Permanent Storage

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

10 Year Storage

- Personnel Records
- Employee Contracts
- Personal Property Leases

7 Year Storage

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

3 Year Storage

- Hard copy correspondence and internal memoranda
- Bank reconciliation reports

1 Year Storage

- Routine emails

ARTICLES OF INCORPORATION

Louisiana law requires that all non-profits register with the Louisiana Secretary of State's office. There is a $75 initial fee to file Articles of Incorporation with the Louisiana Secretary of State at **geauxbiz.com**.

The PTA must file the Annual Report yearly updating its officers. Visit the Louisiana Secretary of State at geauxbiz.com to renew, set up annual email reminders, update the officers, and pay a $15 renewal fee. The Articles of Incorporation shall be kept permanently on file and is part of the annual Active Affiliation Report that is submitted to LAPTA.

After logging into geauxbiz.com under "Quick Links," select "File Annual Report." Or click "Get Started" button. Select "File an amendment, such as an annual report, with the Louisiana Secretary of State." Follow the steps to update officer data. Banks usually reference the Articles of Incorporation when they update signers; therefore, update this information before going to the bank to update signers.

R. Kyle Ardoin
Secretary of State

DOMESTIC CORPORATION
ANNUAL REPORT
For Period Ending
3/11/2021

Mailing Address Only (INDICATE CHANGES TO THIS ADDRESS IN THIS BOX)
34521007 N
MADISONVILLE JUNIOR HIGH SCHOOL PTA

106 CEDAR STREET
MADISONVILLE, LA 70447

(INDICATE CHANGES TO THIS ADDRESS IN THIS BOX)
Registered Office Address in Louisiana (Do not use P. O. Box)
106 CEDAR STREET
MADISONVILLE, LA 70447

A NEW REGISTERED AGENT REQUIRES A NOTARIZED SIGNATURE.
PATRICIA WELCH
106 CEDAR ST MADISONVILLE, LA 70447

New Registered Agent Signature — Date

BETH MAILLHO
106 CEDAR ST MADISONVILLE, LA 70447 — President
CAROLINE SHOLL
106 CEDAR ST MADISONVILLE, LA 70447 — Vice-President
SHELLI MYERS
106 CEDAR ST MADISONVILLE, LA 70447 — Treasurer

SAMPLE

The filing of a false public record, with the knowledge of its falsity, is a crime, subjecting the filer to the fine or imprisonment or both under R.S. 14:133.

SIGN → Beth Maillho (SIGNED ELECTRONICALLY) — President — Date 02/09/2021
Signee's address — Email Address: ON FILE — (For Office Use Only)

Enclose filing fee of $10.00 — Return by: 3/11/2021
Make remittance payable to Secretary of State
Do Not Send Cash
Do Not Staple
To: Commercial Division
P. O. Box 94125
Baton Rouge, LA 70804-9125
Phone (225) 925-4704
web site: www.sos.louisiana.gov DO NOT STAPLE

REPORTS

Robert's Rules of Order, Revised Edition specifies that the Treasurer is responsible for making regular budget and activity reports to the leadership and the General Membership of the PTA. The budget is approved by the membership, and they have a right to see that the Board is spending within those guidelines. Whenever there is an Executive Committee, Board of Directors, or a General Membership meeting, the Treasurer is obligated to present a report on the financial status of the unit. Reports must be given for all accounts, not just the checking account. Whatever record keeping system the Treasurer uses should provide all information necessary to prepare the activity and budget comparison reports. Samples of reports are at the end of this section.

Activity Report

There is no set format for the Activity Report, but it should include the date, the current balance, total of expenses and income, and the previous balance from the last report. Depending on the size and composition of the membership, the Treasurer might need to provide more information, such as a list of all checks written since the previous report and all deposits made since the last report including their source.

Budget Comparison Report

The Budget Comparison Report consists of a copy of the budget with three additional columns, an "actual expense," "actual income," and a "remaining or variance" column which shows how much the PTA is short or over in each category. This format provides a detailed analysis of exactly how the PTA's actual income and expenses compare to the approved budget and indicates if there is a problem in any category. Unless provisions are made otherwise in the Bylaws or when the budget is approved, no budget expense item may be exceeded without authorization from the PTA General Membership.

Distribution

Copies of the reports should be distributed to the members in attendance when possible. For a General Membership meeting, the information may be posted on a bulletin board or throughout the meeting room. The reports should not be adopted but filed for the auditor or audit committee. They do not need a motion to be accepted. A copy should be placed with the minutes as well as in the Treasurer's Binder.

Annual Report

At the close of a unit's fiscal year, the Treasurer prepares an Annual Report. The Treasurer makes a preliminary report to the membership at the annual meeting. This report is for information only and is not officially adopted. The report becomes official after the Audit Report is adopted by the membership. Normally, this takes place at the first business meeting of the new fiscal year. The Treasurer's Annual Report and the Audit Report are filed with the permanent financial records after the adoption of the Audit Report.

RAISING MONEY

Most PTAs need to raise funds to provide programs and services throughout the year; however, fundraising efforts should not be the primary emphasis for PTAs. Fundraising efforts should be in response to supporting approved PTA work rather than driving the goals of the PTA. To help ensure proper alignment with our purposes, LAPTA recommends that PTAs engage in three programs or service projects for each fundraiser activity hosted.

There are many different methods to raise funds, and PTAs will be approached by numerous external groups that offer products and services. It is important that PTA leaders evaluate these opportunities carefully and consider all legal and community-related implications. When using a fundraising company, protect the PTA by having all information in writing. A contract protects the PTA and the fundraising company. With a contractual agreement, all parties assume responsibility for complying with the terms, but the PTA also begins with a clear understanding of who oversees what. Make sure the contract is clearly an agreement between two organizations, not two individuals. Contracts are only signed by the President with Executive Board approval, and the signer adds their title after their name to show they are signing for the PTA. When reviewing the contract, look for cost

and profit percentages, list of approved promotional materials, desired services, dates for delivery and payment, and procedure for handling damaged, unsold, or returned merchandise.

Non-Commercial Policy & Co-Venturing
PTA Bylaws include the requirement to be non-commercial. The name "PTA®" is not to be used in conjunction with the commercial activities of other organizations, including the promotion of their goods or services. A PTA does not raise money for other organizations or individuals, no matter how worthy their cause.

Commercial co-venturing is a popular form of fundraising for PTAs. Commonly, a business advertises a cooperative fundraising effort in which a portion of the sales are forwarded to the PTA as a gift. The size of the gift is determined by how successful the business is in selling its product or service. Given PTA's non-commercial policy, the only appropriate role in such a venture is a passive one. The PTA must refrain from active promotion or marketing of the business's products or services and do no more than inform members of the agreement. Agreements should be structured in such a way as not to appear as an endorsement of a product or company. If this is not possible, the PTA should not enter into the agreement.

INSURANCE & BONDING

Operating a PTA unit is much like running a small business. Businesses have insurance to protect their investments. LAPTA strongly encourages PTAs to obtain adequate insurance protection against liability and monetary loss due to fraud, embezzlement, or dishonest acts. Purchase insurance coverage from a company such as Association Insurance Management (AIM), a company that offers coverage to PTAs and other non-profits at a reasonable price. AIM policies run annually from October 1 to September 30. For more information, contact **AIM at (800) 876-4044 or AIM-companies.com**. AIM offers several types of coverage listed below.

Event/General Liability Coverage
- $1,000,000 or $2,000,000 liability coverage per occurrence (no deductible)
- $5,000 per person medical payment (no deductible)
- Option for increased medical payments: $10,000, $25,000, and $50,000
- Event/General Liability covers fall carnivals, bounce houses, dunking booths, fun runs, skating parties, auctions, and more. *Upgrade available:* Media Liability to cover misuse of content on your PTA website or social media.

Directors & Officers Liability Coverage
- $1,000,000 liability limit
- $1,500 deductible
- If someone sued the officers of your PTA for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions, this coverage would pay to defend them against those actions.

Embezzlement Coverage (Bond)
- Coverage available: $10,000, $25,000, and $50,000
- $250 deductible
- Embezzlement Insurance covers monetary losses sustained by a PTA through any fraudulent or dishonest act(s) or embezzlement committed by any of the elected officers, members, volunteers, or employees.

Property Coverage
- Coverage available: $10,000, $20,000, and $50,000
- $250 deductible
- Property Insurance covers items such as raffle merchandise, auction items, and fundraising supplies while in your PTA's care, as well as your PTA's individual property like popcorn machines, school store supplies, emergency relief supplies, and more.

AUDIT COMMITTEE & REPORT

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

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

Who? Bylaws require that an Audit Committee of at least three members conduct the review. Only members who did not have signature authority may serve on the committee. The election or appointment of members is specified in the Bylaws or Standing Rules.

When? An audit is done once a year even if the same Treasurer remains in office. It may also be requested anytime one is deemed necessary or whenever the authorized signers on the bank account change. The deadline is on the Audit Report form at the end of this section which is October 28, 2022.

How? The Treasurer turns over all necessary documentation to the Audit Committee. The current and previous Treasurers should be available for questions. The Audit Committee may reference the Audit Committee Helpful Hints and Worksheet to assist. The Treasurer supplies the Audit Committee with the following:

- Copy of the last Audit Report
- Checkbook and bank statements
- Expense Forms with receipts
- Deposit Forms with deposit slips and bank receipts
- Ledger for all line items
- Financial reports from all meetings
- Copy of the Annual Report
- Copies of minutes that would include an adopted budget, as well as any amendments that were approved during the year
- Copy of the current Bylaws and Standing Rules
- Any other information requested

Procedure

Begin with the records posted after the last audit which is usually July 1. Check to see if the amount shown on the bank statement corresponds to the starting balance recorded in the checkbook and ledger. Verify that bank reconciliations were done monthly. Reconcile each month's bank statement. Make sure that every check written is substantiated with an Expense Form and receipt. Verify that all purchases have two signatures. Check to see that checks are not being signed by the individual to whom they are made payable. Verify that all income and expenditures are allocated into the approved budget. Make certain that state and national portions of the membership dues were paid to LAPTA. Reconcile each deposit slip with bank statement and checkbook entries. Check the math for the totals. Check each month's ledger entries for error, and crosscheck against checks issued and receipts posted. Check Treasurer's reports and the Annual Report for accuracy. Verify that the reports are true representations of the transactions recorded.

Audit Report

The Audit Committee fills out the Audit Report Form at the end of this section. If all is in order, the committee will find the books correct. If there is a problem, the committee will find the books incomplete, substantially correct with adjustments or recommendations, or incorrect. The report should indicate the information needed and errors committed. The Audit Report must be officially adopted by the PTA and must be included in a completed Annual Report covering the PTA's fiscal year. If the validity of an Audit Report is questioned, Louisiana PTA or an independent CPA should be engaged. At any time during the process, contact Louisiana PTA for assistance.

FEDERAL TAXES

IRS Section 501(c)(3)

The Louisiana PTA and all subordinate units in Active Affiliation are exempt from federal income tax as charitable and educational organizations under the provisions of section 501(c)(3) of the Internal Revenue Code. As such, the subordinates fall under LAPTA's 501(c)(3) blanket exemption. Annually, LAPTA is required to submit to the IRS a list of all units in Active Affiliation. Those listed are covered by our group exemption. Any unit not listed would be subject to income tax on all earnings. If a PTA votes to dissolve, it loses this status and its benefits. To have "**Active Affiliation**," a unit must submit the required paperwork to LAPTA which can be found under the "Run Your PTA" tab at LouisianaPTA.org as well as at the end of this section.

Protecting Tax Exemption

As 501(c)(3) organizations, the LAPTA and its Local Units in Active Affiliation may solicit and spend funds without paying income tax to the federal or state governments if they comply with rules governing non-profit organizations and all income is directly related to the purposes of the organization. To maintain its 501(c)(3) status, a PTA must meet specific standards. The organization must be noncommercial, nonsectarian, and nonpartisan meaning that it does not engage in specific commercial endorsements, is not involved with specific religious groups, and does not endorse or support political candidates or parties. Further, neither the organization's name nor any member acting in an official capacity can endorse or promote a commercial concern or political party or conduct activities not in keeping with the PTA Purposes and Mission.

Donations

The 501(c)(3) designation means that contributions to PTAs are deductible as charitable contributions for federal income tax purposes. If a donor requests verification that a PTA is a 501(c)(3) charitable organization, email the LAPTA office at office@LouisianaPTA.org to obtain an official letter if you do not have one. PTAs must be prepared to issue receipts to donors whose contributions exceed $250 in one day; cancelled checks are no longer sufficient. There is no required format for the receipt, but it must include the PTA's name, donor's name, date, and cash amount received or a description of the property received.

PTAs must inform prospective donors about the extent to which their contributions are tax deductible. This disclosure should indicate the fair market value of any tangible benefit received in exchange for a contribution and the amount of the donation that is deductible as a charitable contribution. For example, if a Spaghetti Dinner ticket sells for $20 and the value of the meal is determined to be $5, the purchaser is entitled to a $15 charitable contribution. The $5 is not the necessarily the cost to the PTA but the value of the meal allowing for a profit.

PTA volunteers may deduct out of pocket expenses while volunteering for the PTA. These include mileage for travel to and from volunteer sites; costs not reimbursed relating to volunteer work, such as phone calls; and the costs of childcare incurred to enable a person to volunteer. The value of a person's time is not deductible. Pizza nights are considered donations.

Unrelated Business Income

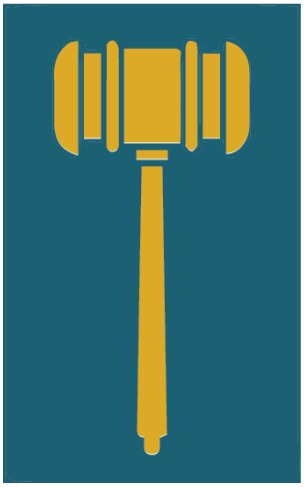
As a tax-exempt organization, PTA revenues are not subject to federal income tax if the revenue is raised in a manner that is related to the PTA's tax-exempt purpose. However, it is possible for some revenue to be subject to income taxation. When this occurs, the amount subject to taxation falls into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

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

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

IRS Tax Filing Requirements (irs.gov/charities-and-nonprofits)
Which 990 Form to File?
If your gross receipts are less than $50,000, use **Form 990-N**. If your gross receipts are less than $200,000, and total assets are less than $500,000, use **Form 990-EZ** or 990. If gross receipts are more than $200,000 or total assets are more than $500,000, use **Form 990**.

All filers must register at IRS.gov prior to filing their Form 990-N. Form 990-N must be completed and filed electronically. There is no paper form. Use the Form 990-N Electronic Filing System (e-Postcard) User Guide while registering and filing. Most common problems can be avoided by following the User Guide. Organizations should continue efforts to file, even if late.



Form 990-N is due every year by the 15th day of the 4th month after the close of the tax year. The e-Postcard cannot be filed until after the tax year ends. For example, if the PTA tax year ends on June 30, the e-Postcard is due November 15. If Form 990-N is late, the IRS will send a reminder notice to the last address on file. There might be a penalty assessment for filing Form 990-N late. Organizations that fail to file required Forms 990, 990-EZ or 990-N for three consecutive years will automatically lose their tax-exempt status. Revocation of the organization's tax-exempt status will happen on the filing due date of the third consecutively missed year.

Form 990-N is easy to complete with only eight items of basic information about the organization. That is the EIN, tax year, legal name, mailing address, and any other names the organization uses, name and address of a principal officer, website address if one exists, confirmation that the organization's annual gross receipts are $50,000 or less, and, if applicable, a statement that the organization has terminated.

Form 1099-Miscellaneous
A PTA is required to file Form 1099-MISC if it paid $600 or more during a calendar year to a business or person for services rendered. Examples include a guest speaker or artist-in-residence. A copy must be sent to the recipient by February 2 of the year following the payment and a copy must be sent to the IRS by March 1. Form 1099 is not required for scholarship recipients regardless of the amount paid. Scholarship winners are required to spend their proceeds on tuition or other required school expenses or else they must report the proceeds as personal income.

STATE SALES TAXES

Units are required to pay state and local sales tax on every purchase. They are also to collect and remit sales tax on items sold unless an exemption has been granted from the state. ***LAPTA is currently working to acquire this exemption, but it is not currently granted***. Many PTAs wrongly assume that since public schools are exempt from paying sales taxes and have a sales tax exemption number from the state, PTAs are also exempt. If a PTA member is asked for a tax number, he is required to inform the salesperson that PTAs are not exempt from sales taxes. Do not use a school's sales tax exemption number to make purchases because this is fraud.

State Sales Tax Exemptions

Units can apply for a sales tax exemption for fundraisers by filing Form R-1048 and submitting it to the Louisiana Department of Revenue no later than two weeks prior to the event. The form can be downloaded from their website, www.rev.state.la.us. The types of fundraisers that are generally granted an exemption include fairs, festivals and admission tickets to dances or performances. Fundraisers that involve an outside promoter or vendor who profits from the event will be denied an exemption.

Additionally, fundraisers involving the sale of products that would be in direct competition with local retailers, such as school supplies, wrapping paper or candy, are not eligible for an exemption. Check with your parish tax collection office to determine the requirements for remitting local taxes.

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

Paying Sales Taxes

If a PTA was denied an exemption or chose not to file for an exemption, it must apply for a Louisiana Tax Number with the Department of Revenue. Download the form from www.rev.state.la.us. Be sure to add that the PTA will have "irregular sales." The unit will then only have to file and pay taxes when items are sold.

Sales taxes are due by the 20th day of the month following the sale. For example, if a fundraiser is held in October, taxes are due by November 20. The sales tax return (R-1029) can also be downloaded from the department's website. PTAs are not obligated to remit sales tax if the fundraising company remits them to the state. Make sure you receive a copy of the invoice for your records indicating that taxes were paid to the vendor. Out of state companies without a sales representative in Louisiana are not obligated to collect or remit sales taxes. It is the PTAs responsibility to collect and remit the taxes on all items purchased or sold.

Again, LAPTA is currently working to acquire this exemption, but it is not currently granted.

GIFTS TO SCHOOLS

PTAs can only give money to schools that is allocated for a designated purpose. Often, schools can purchase items at a significant discount, or a unit may decide to fund a portion of a purchase the school is making. When a unit decides to have the school make a purchase, the General Membership must first approve the gift to be made and its purpose. The donation must specify the designated purpose agreed to in writing between the PTA and the school official. The agreement states the nature of the item purchased, the way it is to be used, and when it will be procured. It should also include that the school will furnish a copy of the invoice to the PTA, and that all funds will be returned to the PTA if the item is not purchased or the terms are not met.

Each PTA wants to ensure that its supported school can purchase items that will improve the quality of education. PTAs shall not give money to a school for purchases without receiving appropriate documentation. A PTA can directly purchase items for a school with a PTA check and then donate them. In this situation, the PTA receives the receipt directly.

A second method is for schools to purchase items and then receive reimbursement from the PTA. In this situation, the school follows procedures set by the school system, and the PTA must also get acceptable documentation. The Treasurer issues a check to the school for the purchase amount. When the item arrives, the school pays the invoice and provides a copy of the invoice to the PTA. If the invoice is less than the amount provided, the school shall reimburse the PTA for excess funds. If the amount due is more than provided, the principal should give the PTA an Expense Form for the balance and attach a second copy of the invoice and purchase order.

See a sample donation form at the end of this section to use when a unit purchases equipment and donates it to the school and when a unit purchases equipment for its own use and stores it at the school. Check with your local school system to determine any regulations about stored items at a school.

ADDITIONAL RESOURCES

The National PTA "*Local PTA Leader Kit"* has a finance section that has a wealth of information. Create an account at **PTA.org** to access other resources such as E-Learning courses. National PTA has gathered several articles relating to basic financial management to help you effectively run your PTA and fulfill your goals while maintaining fiscal responsibility.

Refer to the LAPTA site at **LouisianaPTA.org/treasurer** for up-to-date information, forms, and training. Contact the LAPTA Treasurer at Treasurer@LouisianaPTA.org with any questions.

The Internal Revenue Service website is **IRS.gov**. The "charities and non-profits" section is especially helpful to PTAs and allows downloading of forms and instructions as well as informational brochures. One of the most useful is Publication 4221, "Compliance Guide for 501(c)(3) Tax-Exempt Organizations" which addresses records, what should be kept, and for how long.

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

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 annual 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.

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 is 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 its charter and loss of 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.

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 aafiles@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: _____ Submitted to LAPTA Date: _____

❒ LEADER DATA: Board data was not submitted to LAPTA at https://form.jotform.com/221275677028157.
New deadline: _____ Submitted to LAPTA Date: _____

❒ BYLAWS: Bylaws are outdated or were not submitted.
New deadline: _____ Submitted to LAPTA Date: _____

❒ TAXES: IRS taxes were not filed.
New deadline: _____ Submitted to LAPTA Date: _____

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

❒ AUDIT REPORT: Audit Committee Report was not filed.
New deadline: _____ Submitted to LAPTA Date: _____

❒ ARTICLES OF INCORPORATION: Active Annual Report from LA Secretary of State was not filed.
New deadline: _____ Submitted to LAPTA Date: _____

❒ TRAINING: Proof of PTA Leadership Training for all elected officers was not filed.
New deadline: _____ Submitted 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.

INVENTORY ACCOUNTABILITY FORM

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

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

Quantity	Value	Name	Item Description	Note

We agree to the findings of this Inventory Accountability Form:

Date _____ Person #1 Signature _____ Person #2 Signature _____ Page(s) _____ of _____

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

TREASURER'S OVERVIEW

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

- ❒ Turn over meeting held with outgoing Treasurer. Date: _____
- ❒ Signature cards on file with the bank. Date: _____
- ❒ Budget Committee formed. Date: _____
- ❒ Proposed budget presented to Board for consideration. Date: _____
- ❒ Proposed budget presented to General Membership & approved. Date: _____
- ❒ Budget Approval Form and budget submitted to LAPTA. Date: _____
- ❒ Gather documentation for the Active Affiliation Report due by October 28, 2022. Date Submitted:_____
- ❒ Budget amendments approved by General Membership on: Date: _____
- ❒ Date: _____ Date: _____ Date: _____
- ❒ Bookkeeping method is _____. Any login passwords and accounts are _____.
- ❒ Expense and Deposit Forms copied and distributed to Board of Directors.
- ❒ Treasurer and President develop a workable reimbursement system. Emphasize that only budget approved expenses will be reimbursed and only with receipts/invoices attached. Date shared with Board: _____
- ❒ Enter and file Expense and Deposit Forms on an ongoing basis.
- ❒ Bank statement is opened and signed by someone who is not an authorized signer on the bank account. Treasurer and President review bank statements and financial status monthly.
- ❒ Activity and Budget Comparison Reports given at all Board of Director and General Membership meetings. List the date and type of meeting. _____
- ❒ Books closed and annual report prepared. Date: _____
- ❒ Audit Committee chosen for past school year. Date: _____

Auditors: _____

Auditors: _____

Auditors: _____

LOCAL PTA UNIT
BUDGET APPROVAL FORM

Deadline to submit to LAPTA: **October 28, 2022**

This form is required to maintain a Local PTA Unit's Active Affiliation with LAPTA and National PTA. It should be submitted annually by **October 28, 2022**. See the Active Affiliation Report for other required items.

Local Unit Name	Local Unit Parish	Local Unit LUR#

School Name

The PTA's budget for the 2022-2023 fiscal year was approved at the General Membership meeting held on

_____.

❒ Attached is the Approved Budget.

President's Signature	Treasurer's Signature
President's Name	Treasurer's Name

SAMPLE BUDGET XYZ PTSA

July 1, 2022 – June 30, 2023

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

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

SAMPLE COMPARISON BUDGET XYZ PTSA

May 22, 2023

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

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

YEAR-END FINANCIAL CHECKLIST

Preparing the Treasurer's Binder

- ❒ Passwords & Accounts: Have all accounts and passwords typed up in the front of the binder. Include the LUR (Local Unit Registration number issued by National PTA), EIN and official Local Unit name on the tax filing, and the Louisiana Charter number. Include login information for email accounts, geauxbiz.com (and annual renewal date), IRS tax filing, and other accounts like AIM insurance (and annual renewal date), CheddarUp.com, SquareUp.com (credit card payments), Zoom, websites, and Treasurer software like MoneyMinder.com. Include current Board Roster. Sample summary page is at the end of this section. The President, Treasurer, and Secretary shall have a copy of the Passwords & Accounts Summary.

- ❒ Expenses: All expenses must have receipts and Expense Forms signed by two authorized people. Pay any outstanding bills. Enter all expenses into accounting software. Submit all LAPTA and National PTA dues.

- ❒ Deposits: All Deposit Forms with cash require two signatures. Contact anyone with bounced checks to get it paid. Transfer money from any online or credit card accounts like CheddarUp.com, etc. Enter all deposits into accounting software.

- ❒ Bank Statements: Include all bank statements from July of previous year through June. Every statement needs to be signed by someone who is *not* a check signer. Reconcile the bank account to the current month. Print reconciliation reports. MoneyMinder.com is a great online accounting platform that is easily passed down from year to year.

- ❒ Budget: Include monthly budgets and meeting agendas in the binder. Prepare and print the final year-end budget including every transaction for each budget category. In the financial software such as MoneyMinder.com, create the new year and draft a preliminary budget.

- ❒ Charter Info: Include a copy of the taxes in your binder. Print out the approval email, or other proof that the taxes were filed. Include a copy of the insurance policy (usually with AIM) and Secretary of State (geauxbiz.com) registry which need to be updated yearly. Include the previous year's Audit Report, Bylaws, and any Standing Rules.

- ❒ Bank Signers: If there will be new people signing on the account for the next year, contact the bank about who needs to be present to update signers. Some banks want both the old and the new people present, plus paperwork such as the meeting minutes from the elections. Most terms end on June 30.

- ❒ Checks & Debit Cards: Have the checks, ledger or register, and any debit cards together. Destroy debit cards for those who will not be authorized to use the account next year. The new Board may request new debit cards issued with the PTA name and the name of authorized officers.

- ❒ Meet with the Incoming Treasurer and President to turn over all financial records. Complete the Year End Treasurer Checklist. Answer all questions and explain all financial matters. Assist as needed with the Audit Committee.

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

DEPOSIT FORM

Louisiana PTA
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Name _____ Date _____

	Name on Check	Check #	Amount
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
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33			
34			
35			
36			
37			
38			

Cash Summary:

$1 X = _____

$2 X = _____

$5 X = _____

$10 X = _____

$20 X = _____

$50 X = _____

$100 X = _____

TOTAL = _____

Coin Summary:

1¢ X = _____

5¢ X = _____

10¢ X = _____

25¢ X = _____

50¢ X = _____

1.^{00}¢ X = _____

TOTAL = _____

Total # of Checks: _____

Count the actual checks to catch any overlooked checks.

Deposit Totals

Checks: $ _____

Cash: $ _____

Coins: $ _____

Total: $ _____

Budget Items to be Credited	$ Amount

_____

Executive Board Member Signature

_____

Second Signature for Cash Deposits

For Treasurer's Use Only

Dep Date: _____ Amount: _____

☐ Entered into Ledger/Accounting Software

EXPENSE FORM

Attach all receipts to the **back** on **this side** of the page.

_____ $ _____
Date Total Amount

Requested by: _____

Choose One:
❒ Debit Card Purchase (Do not reimburse)
OR
❒ Check Payable to: _____

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

Amount	*Receipt's Store Name*	*Budget Line Item*

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

Amount	*Budget Line Item*

Grand Total for Check Reimbursement: _____

Deliver check to: _____

Mail Check to: _____

Certification: The expenses listed are authorized PTA expenses.

_____
Signature Date

_____
Signature Date

FOR TREASURER'S USE ONLY

_____ _____ $ _____
Date Disbursed Check # Amount

_____
Note

❒ Receipts Attached
❒ Entered in Accounting Software/Ledger

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA Units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit **LouisianaPTA.org/bylaws** for details. Bylaws not in compliance will be returned to the Local Unit. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments to **Bylaws@LouisianaPTA.org**. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President's email.

Local Unit Name _____ Local Unit Parish _____ Local Unit LUR# _____

President's Email _____ President's Phone _____

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

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

Choose all that apply.
☐ The Bylaws approved by the General Membership are attached.

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

_____

_____

_____

_____

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

President's Signature _____ Secretary's Signature _____

President's Name _____ Secretary's Name _____

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to **Bylaws@LouisianaPTA.org** in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final approved document to the President's email.

Contact Bylaws@LouisianaPTA.org with any questions.

AUDIT REPORT

Local Unit Name	LUR#	IRS EIN
Parish	Fiscal year	Total # of Memberships YTD

Dates covered by this audit Day 1 _____ to last day _____
Check numbers reviewed by this audit _____ to _____

Ledger Reconciliation

Balance on hand on day 1 of audit year	Date _____	1. $_____
Total deposits for audit year		2. $ _____
	TOTAL (add lines 1 & 2)	3. $ _____
Total expenses with receipts of audit year		4. $ _____
Balance on hand on last day of audit year	TOTAL (line 3 minus line 4)	5. $ _____

Bank Reconciliation

Bank statement day 1 start balance	Day 1 Date _____	6. $ _____
All credits on 12 bank statements		7. $ _____
Deposits not yet credited (_____)		8. $ _____
	TOTAL (add lines 6, 7 & 8)	9. $ _____
Total withdrawals on 12 bank statements		10. $ _____
Total uncleared checks (_____)		11. $ _____
	TOTAL (line 9 minus lines 10 & 11)	12. $ _____

Line 5 must equal line 12.

The Audit Committee examined the financial records of the Treasurer at _____ _____ PTA/PTSA and find them (check one):

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

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

Date Audit completed _____
Auditor's Name, Email, Phone _____
Auditor's Name, Email, Phone _____
Auditor's Name, Email, Phone _____

AUDIT PROCEDURES & HINTS

Supplies

For the audit, the committee members (as determined by your Bylaws) will need the check book, binder with current fiscal year invoices of Expense Forms and Deposit Forms, all bank statements for the fiscal year, and a copy of the previous year's audit.

- Committee person #1 reviews the bank statements for the fiscal year.
- Committee person #2 reviews the checkbook or accounting software file for the fiscal year.
- Committee person #3 reviews all expenses and Expense Forms for the fiscal year.

Each committee member oversees one part of the financials to review. The Treasurer may not participate in audit except to answer questions if necessary.

Instructions

1) Start with previous year's audit to verify beginning of year balance. Check this against the checking account balance from that time.
2) Next, verify each check written and each deposit made against the checkbook and bank statement for each month. The committee member #3 will verify the signed Expense Forms and receipt for all checks written and deposits made.
3) Keep a list of outstanding checks and deposits and check them off as you go through each month.
4) At the end of the fiscal year, record on the Audit Committee Report all outstanding items. Deposits are recorded on line 8, and checks are recorded on line 11.
5) Write the ending balance, which should be the same amount listed on the Audit Report line 5.
6) Complete the Audit Report by inserting the appropriate figures in each blank.
7) All committee members must sign the form stating that the PTA books were complete or incomplete.
8) If not complete, please seek advice from the LAPTA Treasurer.

Directions by Line Number

Line 1: Date of last audit (which should be the first day of the audit year) and dollar amount on hand.
Line 2: Total amount of all deposits in ledger or financial software for the entire audit year.
Line 3: Add line 1 and line 2 to get the total dollar amount.
Line 4: Total amount of all expenses with receipts in ledger or financial software for the entire audit year.
Line 5: To get the ending balance on hand for the audit year, subtract line 4 from line 3.
Line 6: Write the date and starting balance on the bank statement on day 1 of the audit year.
Line 7: Write the sum of all credits on the 12 bank statements for the audit year.
Line 8: Write the sum of any deposits not credited to the account on the bank statements.
Line 9: Write the sum of lines 6, 7 and 8.
Line 10: Write the sum of all withdrawals on the 12 bank statements for the audit year.
Line 11: Write the sum of any withdrawals not posted to the account on the bank statements.
Line 12: Subtract lines 10 and 11 from line 9.
Line 5 and line 12 should be the same amount.

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AUDIT WORKSHEET

Complete as needed to assist with the audit.

DEPOSITS

Deposits from_____ to_____ $ _____
Day 1 Day 365 Sum of deposits (Line 7 of Audit Report)

Enter receipts from front page of bank statements as you go along in audit. Total deposits are listed near the ending balance on front page of bank statement.

Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____

Deposits Not Cleared: (Line 8 of Audit Report)

Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____
Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____
Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____
Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____

EXPENSES

Disbursements from_____ to _____ $ _____
Day 1 Day 365 Sum of withdrawals (Line 10 of Audit Report)

Enter disbursements/withdrawals from front page of bank statements. Totals from efts, withdrawals, checks and service fees should be listed near ending balance on front page of bank statements.

Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____
Month_____ Amount_____ Month_____ Amount_____

Checks Not Cleared: (Line 11 of Audit report)

Ch #: _____ Amount: _____ Ch #: _____ Amount: _____ Ch #: _____ Amount: _____
Ch #: _____ Amount: _____ Ch #: _____ Amount: _____ Ch #: _____ Amount: _____
Ch #: _____ Amount: _____ Ch #: _____ Amount: _____ Ch #: _____ Amount: _____
Ch #: _____ Amount: _____ Ch #: _____ Amount: _____ Ch #: _____ Amount: _____

SAMPLE NSF LETTER
Returned Check Due to Non-Sufficient Funds

Current Date

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

RE: Check returned for not sufficient funds Check # 456
Check Issued Date
Tickets for the Fall Festival

Dear Check Writer,

The ABC PTA received notice on October 12, 2022, that the check written for Fall Festival tickets totaling $55.00 was returned to us due to insufficient funds in your account. Over the past thirty days, we have been in contact with you and the bank in an attempt to collect the amount owed for the tickets. A detailed log of contacts and actions is below.

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

Check #456	$55.00
Bank return fee	$15.00
Bank return fee	$15.00
Bank return fee	$15.00
Total	$90.00

Please remit the cash to the school by Friday, November 17, 2022, at 2:30 pm.

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

Sincerely,

Treasurer Name,
ABC PTA Treasurer

President Name,
ABC PTA President

(Copies should be sent to the principal and President or manager of the bank.)

PTA MONETARY DONATION TO A SCHOOL OR DISTRICT

The_____ PTA is donating $ _____
to (Name of school or district) _____
for the purchase of _____
_____
by the date of _____.

It is agreed that the recipient of the monetary donation will supply the PTA with a copy of the purchase order or requisition and a copy of the paid invoice.

If this purchase is not made, then the recipient of the monetary donation will return $_____
amount to the PTA by the date of _____.

_____

PTA President Date

_____

Principal or Administrator Date

EQUIPMENT PURCHASED BY A PTA FOR ITS USE (ITEM STORED AT SCHOOL)

The_____PTA purchased for its own use_____.

The equipment will remain the property of the PTA but will be stored at the school named _____ _____.

- PTA members may use the equipment.
- School staff or students may use the equipment under the supervision of a PTA member or with written permission.
- Anyone using the property, other than PTA members, will pay for supplies and maintenance.
- Should the item be stolen or misplaced the PTA will be responsible for replacement. Anyone other than the PTA using the item when a loss occurs agrees to reimburse the PTA for replacement cost.

_____

PTA President Date

_____

Principal or Administrator Date

DONATION RECEIPT

Date _____

Name _____

Cash contribution $ _____

In-kind non-cash items exceeding $250 in value (description of items):

_____

_____

"Quid Pro Quo" contributions are contributions made partly as a contribution and partly in payment for goods and services received, for example, a ticket price that is higher than its normal value. For Quid Pro Quo contributions of more than $75, list item(s) and total amount paid for each. _____

_____

_____

In consideration of their donation, donor received (e.g., value of meal): _____

_____

_____

The _____ PTA is a tax-exempt nonprofit organization as described in Section 501(c)(3) of the Internal Revenue Code. This exemption applies to all Louisiana PTA constituent organizations.

Authorized by _____

IRS EIN: _____

PLEASE RETAIN FOR YOUR TAX RECORDS.
THANK YOU FOR YOUR SUPPORT.

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 990N: login username & password; email & phone associated with account; other security question answers; Note where to file 990: irs.gov - File - charity & nonprofits – finding filing forms – Form 990 series returns – Form 990 N – submit form 990; or **Efile.form990.org**: name, login ID #, password
AIM Insurance: aim-companies.com; Insure# LA0009999; Username & password; 800-876-4044; policy expiration date
Moneyminder.com: email & password
CheddarUp.com: email & password; ABCPTSA.CheddarUp.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

Email Accounts: (This might only be held by the President.)
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 the President, Treasurer, and Secretary.

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

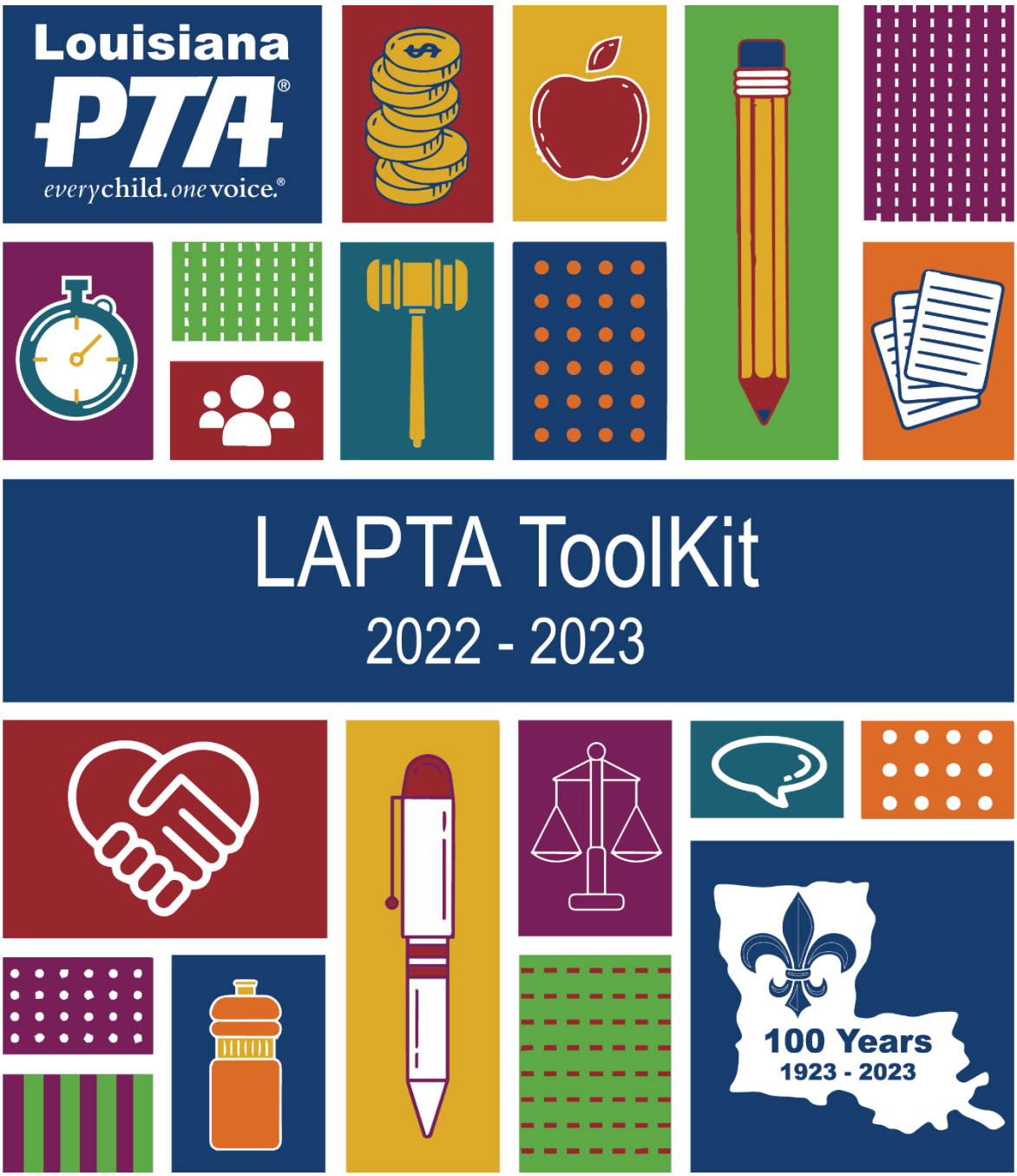
Members of the Board of Directors of the PTA/PTSA serve in a **fiduciary capacity** and owe a **duty of care**, a **duty of obedience**, and a **duty of loyalty** to the PTA. Board members shall conduct themselves with **integrity** and **honesty** and act in the **best interests** of the PTA. Disclosure 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.

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

Date	Board Member Name	Position	Signature



Secretary

2022 – 2023

Section 4

INDEX

About National PTA 3
Leadership Traits 4
Importance of Secretary 4
Dates and Deadlines 5
Responsibilities of Secretary 7
Historian 8
Minutes 9
Motions and Elections 10
Content of Minutes 10
Records Retention 12
Secretary's Binder 12
Customize the PTA Logo 12
Communications and Social Media 13
Sample Agenda 15
Sample Minutes 16
Motion Form 17
Roster Sign-In Sheet 18
Confidentiality, Ethics, and Conflict of Interest Policy 19
What is Active Affiliation? 21
Retention Plan 21
Reactivation Phase 21
Active Affiliation Overview 22
Active Affiliation Cover Page 23
Active Affiliation: Plan of Action Form 24
Inventory Accountability Form 25

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 Secretary, 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

IMPORTANCE OF THE SECRETARY

The Secretary is a particularly critical position on a Local PTA Board and one of only two positions that are required by law as an organization in Louisiana (Secretary and President). The PTA Secretary is responsible for keeping accurate records of the proceedings of the PTA, maintaining complete records of members and leaders, and sending communications on behalf of the Board.

Never say, "I'm just the Secretary"! An effective Secretary should be prompt, accurate, and dependable, and have a thorough knowledge of the PTA purposes, Bylaws, Standing Rules, policies, and methods. This guide will familiarize you with the responsibilities required and the opportunities available to be an effective Secretary. The records the Secretary maintains will be the history of the PTA.

Louisiana PTA®
everychild. onevoice.®
100 Years
1923 - 2023

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
July 25 "Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
July 25 Submit new membership dues at LouisianaPTA.org/membership

August 2022

August 1 Reflections Program opens at LouisianaPTA.org/reflections-program
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
August 25 Submit new membership dues at LouisianaPTA.org/membership
August 27 LAPTA Leadership Training North for northern Local PTA Units
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: 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

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

November 2022

November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
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
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

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

RESPONSIBILITIES OF THE SECRETARY

- Register as a PTA Leader at https://LouisianaPTA.org/submit-officer-data-1.
- Work with the outgoing Secretary to review your responsibilities and the PTA's practices.
- Provide guidance to incoming Board members on best practices for your PTA.
- Sign the Louisiana PTA (LAPTA) Confidentiality, Ethics, and Conflict of Interest Policy.
- Ensure all members of the Board have completed LAPTA Training and signed the PTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Review annually the Records Retention Policy.
- Keep accurate records of the proceedings of the PTA and complete records of members and leaders.
- Send communications on behalf of the Board.
- Participate with full rights of a Board member, make motions, nominate candidates, enter discussions, and vote.
- Prepares order of business, if asked by the President, on all pending matters known in advance.
- Record in the minutes all business transacted at each meeting of the General Membership and Board.
- Sit close to the President and stand to read the minutes or when making the Board report.
- Assist the President in establishing a quorum and maintain a roster record. See a sample Roster Sign-In Sheet at the end of this section.
- Assist in counting a verbal vote when requested by the President.
- Call the meeting to order in the absence of the President and Vice-President(s) and preside until a temporary chair is elected by the membership.
- Prepare a draft of the minutes of a meeting within five days after each meeting for the President.
- Assume the duties of the historian if one is not designated in the Bylaws. Collect and preserve documents relating to the history of the PTA. Present a written report to the membership as the official history to be adopted at the annual meeting (optional).
- Maintain all minutes, records, reports, procedure book, and other pertinent materials.
- Maintain records in compliance with the PTA's Records Retention Policy.
- Study all references to duties in the PTA Bylaws, policies, and Standing Rules.
- Ensure your local PTA meets all requirements of Active Affiliation with LAPTA. If not, follow up on what is missing.
- Keep on permanent file the PTA Employer Identification Number (EIN) as assigned by the IRS.
- Notify Board members, as requested, of all called meetings.
- Present a report of the Board meeting's actions and recommendations at the next meeting.
- Coordinate with the membership chair to report member totals and amount of dues submitted to Louisiana PTA.

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

The Corresponding Secretary

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

Recording Secretary

- Prior to each meeting, if requested and at the consultation of the President, the Secretary prepares a complete agenda. An agenda shows the order in which business should come before the group.
- Maintains roster record for meetings.
- Assists the President in determining if a quorum is present.
- The Secretary should have the following available at all meetings:
  - Minute book (bound journal with numbered pages)
  - Agenda
  - Most current and approved Bylaws and Standing Rules
  - PTA Calendar
  - Minutes of previous meetings
  - List of Standing and Special Committees and their members' names
  - Membership list (A list of Board members is needed for Board meetings. A list of all members is needed for General Membership meetings. The membership list is maintained by the Membership Chair.)
  - Copy of Robert's Rules of Order, Newly Revised, if possible
  - Blank paper for ballots
  - Motion Forms (See end of this section.)
- Calls the meeting to order in the absence of the President and Vice-President, unless the Bylaws state otherwise, and presides until election of a *chair pro tem*.
- Accurately records all business transacted at each meeting of the PTA, which includes General Membership, Board of Directors, and Executive Committee meetings.
- Distributes the appropriate minutes for each meeting type. Board of Director meeting minutes are read and distributed only at Board meetings. General Membership meeting minutes are read and distributed only at General Membership meetings.
- Stands and reads the minutes at all meetings.
- Acts as custodian of all records except those specifically assigned to others.
- Makes minutes and records available upon the request of a member. The records of the Secretary are open for the inspection of any member. However, records must not be released from the custody of the Secretary except upon written order of the President.
- Attends all training offered.
- Perform other delegated duties as assigned such as those of a corresponding Secretary.
- Counts a rising vote when requested by the presiding officer.

HISTORIAN

The position of historian is an optional position. If the PTA does not have a historian, these duties are the responsibility of the Secretary. Check your PTA Bylaws to determine if your PTA has a historian. The PTA may have a tradition that a history book or scrapbook is created to include all activities sponsored by the PTA and includes the Historian Report. This book should be kept in a convenient place such as the school library or office. In this case, the historian is usually a designated position and not the responsibility of the Secretary.

The historian prepares and updates a record of the activities and achievements of the PTA and makes historical facts available on request to the membership. The historian's formal written report is the official history, presented and adopted at the annual membership meeting, and filed with the minutes. It is a summary of all the PTA's activities for that fiscal year. The Historian Report includes:

- A list of the Board members and when they were elected or appointed.
- All Board meeting and membership meeting dates along with any major business conducted by the Board and presented to the membership.
- The programs and activities hosted by the PTA during the year, including a brief description of each training or other events or activities that Board members attended.

MINUTES

The official record of all meetings is referred to as the minutes. They need to be kept forever as the permanent record of the PTA. Because minutes can be used as legal documents in litigation, it is imperative that they be objectively recorded and conscientiously transcribed into a final document. Although it is the responsibility of the Secretary to record, prepare, and preserve the minutes, it is every member's responsibility to read the minutes. Remember, if it is not in the minutes, it did not happen.

Minutes are not a report but a record of the business of the PTA. Minutes protect the PTA and its members. They contain a record of what is done, not what is said. Personal opinions and discussions are not recorded. The minutes contain a record of all actions taken by the group, including the exact wording of every motion, the name of the maker of the motion, and the action taken on the motion. Minutes are written efficiently – complete, concise, and accurate. They must be as brief as possible but include all necessary and accurate information.

Writing the Minutes

The minutes are written legibly in permanent black or blue ink and signed by the Secretary in a **bound journal** with **numbered pages** to avoid alteration or removal of pages. PTA units may choose to have one journal for all meetings or to have two journals (one for the Board of Director meetings and one for the General Membership meetings.) Minutes specify the date, place, time, type of meeting, and the names and presence of the presiding officer and Secretary or names of their alternates. Then the Secretary follows the agenda, taking notes on information and motions, while excluding personal opinions and discussions. At the close of the meeting, the Secretary signs the minutes.

Preparation

When taking the minutes of the meeting, have extra pens, the bound journal for minutes, and blank Motion Forms (found at the end of this section). Arrive at the meeting site early to ensure that everything is ready. Have a copy of the agenda, the roster sign-in sheet, as well as any reports, financial statements, or other documents that may be referred to during the meeting. In the absence of the Secretary, a s*ecretary pro tem* may be elected.

All meetings may be recorded (audio or video) by one Board member, preferably the Secretary, for the purpose of accurately documenting business conducted during the meeting. Everyone present must be told at the start that the meeting will be recorded, and anyone may request to pause the recording during discussion. All recordings are to be destroyed after minutes have been documented.

What to Record

The most difficult part of taking minutes is deciding what information must be written down verbatim, what can be paraphrased, and what is nonessential for the official record. Minutes are meant to be concise, factual, and objective records of what has happened during the meeting. Therefore, do not allow personal preferences to influence notetaking. It can be difficult to discriminate from among all the opinions and facts. Record the proceedings fairly and take a disinterested position. As a recorder, listen carefully and ask the President or Chair for clarification, if needed.

When a **counted vote** occurs, the manner and number of votes for each side should be recorded. The Secretary should be prepared with blank paper for voting by ballot and help count the vote when requested. Reports of officers, standing, and special committees may be attached to the minutes to avoid copying. The Secretary can record a brief statement of activity. Any motions coming from the report must be recorded in the minutes.

At the end of a meeting, a motion to adjourn is only necessary if a member wants to adjourn before completing all business.

MOTIONS & ELECTIONS

Motions are statements that describe a proposed action or decision. The process of making motions ensures that all decisions are fairly discussed and voted on. It is necessary to record motions verbatim, as well as the names of the individuals who made them. There is an optional **Motion Form** at the end of this section to assist in recording motions properly. Record the name of the person who made the motion, whether there was a second, the date, the exact verbiage of the motion, verbal or ballot vote, and whether the motion passed or failed. When there are multiple motions in a meeting, keep the motions numbered and in order. If a motion is withdrawn, it is as though it never happened. Only record the final version of a motion.

When typing a motion in the minutes, it shall be indented, in bold, and all caps. Here is an example:

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

Elections

When writing the minutes for election results, use the following sample template.
No nominations from the floor were submitted. A verbal vote was taken, and the slate of officers was accepted. **The elected Board of Directors** for 2022-2023 ABC PTA is:

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

Courtesy Seat

Only those persons listed on the agenda may speak at a meeting. Therefore, a "Courtesy Seat" may be extended to a visiting non-Board member. The minutes would state, "**A courtesy seat was extended to** Officer Brown with Louisiana State Police. He spoke about dismissal traffic concerns."

CONTENT OF MINUTES

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

Draft Minutes
Minutes shall be typed within five days of its meeting, which are called the "draft minutes." To begin, have the agenda, bound journal, Secretary's binder, any reports or documents distributed at the meeting, verbatim copies of motions, and Bylaws at hand. Use the same template for all minutes which can be in a narrative or outline form. Number the pages consecutively. Assemble all attachments for inclusion with the final copy. Minutes are written in the third person. It is good practice to present the President with a draft to help find misinterpretations or sensitive material that should not be printed.

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

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

Correcting the Minutes
Corrections are suggested without motion or vote. Be grateful for corrections to the minutes. At least someone was listening closely enough to detect an error, and those corrections enable you to keep a more accurate record for the PTA. Minutes may be corrected whenever the error is noticed, regardless of the time that has elapsed. To correct minutes after they have been approved requires a 2/3 vote. Corrections are made in red ink by drawing a line through the information with the correction above or written in the margin and initialed by the Secretary.

Nothing is ever erased once the minutes have been approved and signed. Any member has a right to examine the minutes of the General Membership meetings, but this right must not be abused. The original minutes must not be released from the custody of the Secretary except upon the written order of the President. If a committee needs records held by the Secretary, the Secretary provides a copy to the committee chair after consulting with the President. For example, during the financial reconciliation process, the Secretary should present the approved minutes from General Membership and Board meetings along with the current membership roster and the current Bylaws and Standing Rules. For help or questions, contact LAPTA at office@LouisianaPTA.org.

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

It is permissible, if the meeting occurs less often than quarterly, to authorize a committee to approve the minutes on behalf of the assembly. An annual convention is a good example. It would be futile to get the minutes one year later.

RECORDS RETENTION

Digital and paper records are acceptable.

Permanent

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

7 Years

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

3 Years

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

SECRETARY'S BINDER

Create a Secretary's Binder using the previous Secretary's Binder or start a new one. Suggested sections:
Tab 1: Summary of PTA accounts and passwords and the Board roster.
Tab 2: LAPTA Toolkit: Secretary, plus sections 1, 5, 9, and 10 (at minimum)
Tab 3: Membership: spreadsheets, reports, notes, email campaigns, Welcome Packet, etc.
Tab 4: Agendas, Minutes, meeting rosters, committee reports from meetings
Tab 5: Copies of Deposit Forms and Expense Forms (optional)
Tab 6: Charter Info (filed IRS taxes, Bylaws, Standing Rules, Secretary of State Annual Report, insurance policy, past audit reports)
Tab 7: Other

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*every***child**.*one***voice**). 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. Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

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

Mandeville High PTSA® everychild. onevoice.®

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!

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

SAMPLE AGENDA

Madison Elementary PTA Board Meeting **AGENDA**

January 19, 2022 *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/ Why do we PTA?**:** 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

- ☐ Used Uniform Sale
- ☐ 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
Jan 31 Dominos Night
Feb 21 Board Meeting at 9:30
Mar 21 Board Meeting at 1:30

Adjournment ..... Tera

SAMPLE MINUTES

ABC PTA Board of Directors Meeting

November 12, 2022
ABC Faculty Lounge

Call to Order: President Kayla Pagel opened the Board of Directors meeting at 9:03 a.m.
Opening: PTA Mission read by Kayla Pagel
Attendance: See the attached roster. A quorum was established.
Minutes: The minutes from 10/12/22 were dispersed by Secretary Beth Cleveland and approved as read.
Treasurer's Report: The XYZ Bank account balance is $#,###. The dispersed budget and reconciliation reports were reviewed and filed. Treasurer Catherine Tully filed IRS taxes on 10/4/22.
President's Report: The Lunch & Learn for Family Engagement on 11/20/22 will have the LA Children's Advocacy Group to speak about students' reading skills. The Macho Taco food truck will be there for ordering food.

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

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

Membership: 652 memberships YTD; submitted dues to LAPTA on 11/5/22 for 289 new members
Reflections: A verbal vote was taken in favor of a $25 Barnes & Noble gift card for the Reflections winners.
Hospitality:

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

Newsletter: Photos needed at the 8th Grade Dance on 11/28/22 and band concert on 12/6/22
Beautification: Need to decorate campus for Christmas/winter holidays.
Program: Sam Wright, DOTD, presented information about the Safe Routes to Schools Program.
Traffic:

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

Unfinished Business: Backordered fundraising prizes are still on order.
New Business:
Announcements: Next Meeting is on December 10, 2022, at 9:00 a.m.
Adjournment: The meeting adjourned at 10:15 a.m.

Beth Cleveland

Beth Cleveland, Secretary *(or Secretary Pro-tem)*
Approved as read on 11/12/22 or approved with corrections on _____

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

MOTION FORM

I move that: _____

_____

_____

_____

_____

_____

_____

_____ _____

Printed name of person who made the motion Signature

FOR SECRETARY'S USE

_____ _____ _____

Meeting Date Motion Number

Motion was: ☐ Seconded ☐ Adopted ☐ Amended ☐ Failed ☐ Withdrawn

---

I move that: _____

_____

_____

_____

_____

_____

_____

_____ _____

Printed name of person who made the motion Signature

FOR SECRETARY'S USE

_____ _____ _____

Meeting Date Motion Number

Motion was: ☐ Seconded ☐ Adopted ☐ Amended ☐ Failed ☐ Withdrawn

ROSTER SIGN-IN SHEET

Meeting Name:		**Date:**	
Position	**Name**	**Dues Submitted**	**Signature**
President		☐ Yes ☐ No	
Vice-President		☐ Yes ☐ No	
Treasurer		☐ Yes ☐ No	
Secretary		☐ Yes ☐ No	
Membership		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
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		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	

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.

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

Date	Board Member Name	Position	Signature

WHAT IS ACTIVE AFFILIATION?

Each membership year, Local PTA Units must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have "Active Affiliation" means that the Local PTA 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. 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 Units Bylaws Template, adopted May 2022, Articles II and III. The Local PTA Unit 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 aafiles@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.

INVENTORY ACCOUNTABILITY FORM

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

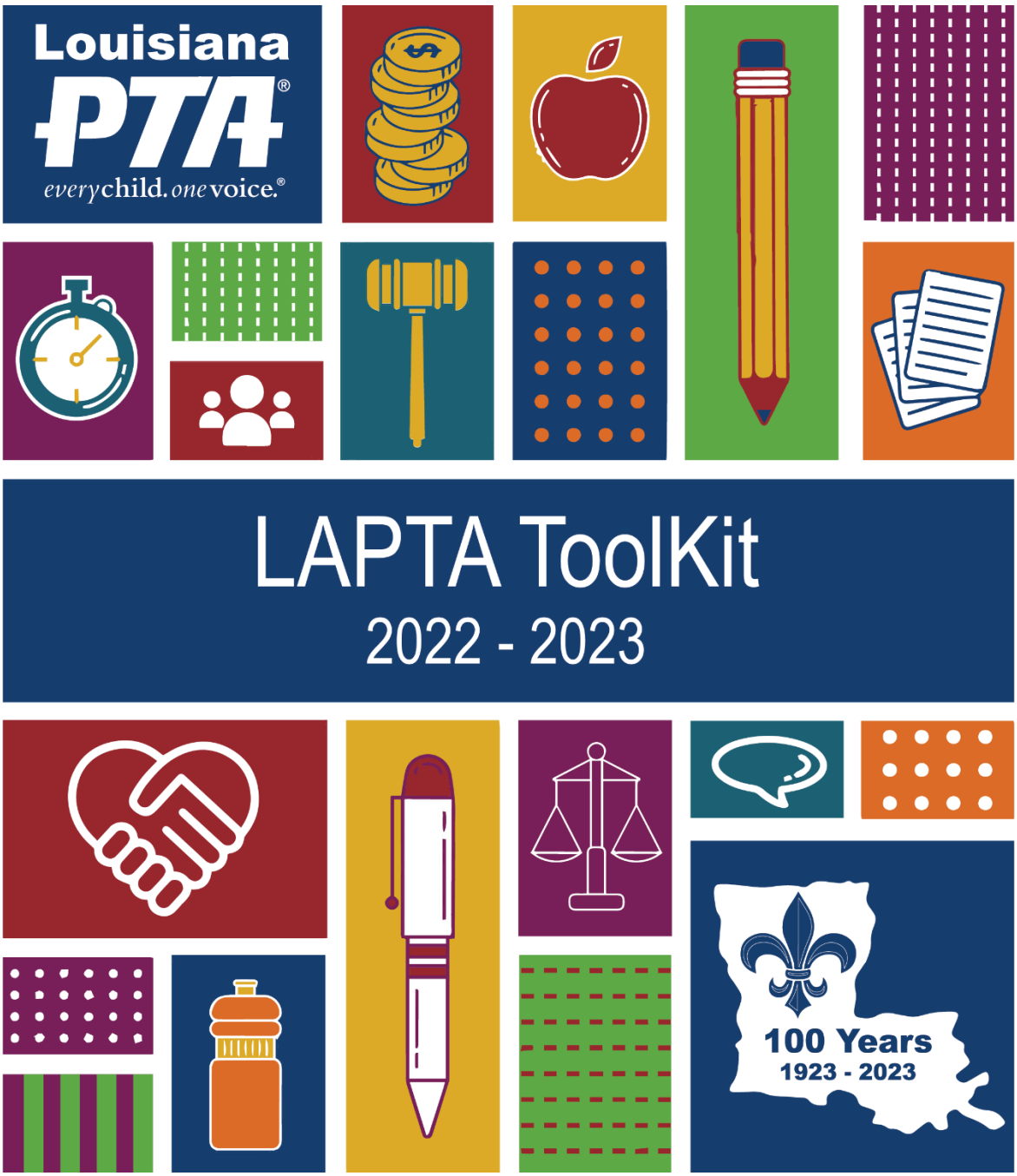
Date of Inventory _____ Person #1 doing inventory count _____ Person #2 doing inventory count _____

Quantity	Value	Name	Item Description	Note

We agree to the findings of this Inventory Accountability Form:

Date _____ Person #1 Signature _____ Person #2 Signature _____ _____of_____ Page(s)

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



Board of Directors

2022 – 2023

Section 5

INDEX

About National PTA 3
Dates and Deadlines 4
Being a Board of Director Member 6
Quorum 7
Importance of Boardsmanship 7
Getting Started 8
Executive Committee 9
Committees 9
Committee Examples 9
Orientation Meeting 12
Virtual Meetings 12
Setting Goals 12
Finance for Board Members 13
How Boards Succeed 14
PTA Leadership Training 15
Procedure Binder 15
Communications and Social Media 16
PTA FAQs 18
Dos and Don'ts of Partnering with Administration 19
Dos and Don'ts of Partnering with Teachers 20
Confidentiality, Ethics, and Conflict of Interest Policy 21
Bylaws Approval Form 23
Inventory Accountability Form 24
What is Active Affiliation? 25
Retention Plan 25
Reactivation Phase 25
Active Affiliation Report 26
Active Affiliation: Plan of Action Form 27

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100 Years
1923 - 2023

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.

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
July 25	"Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
July 25	Submit new membership dues at LouisianaPTA.org/membership

August 2022

August 1	Reflections Program opens at LouisianaPTA.org/reflections-program
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**
August 25	Submit new membership dues at LouisianaPTA.org/membership
August 27	**LAPTA Leadership Training North for northern Local PTA Units**
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: 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

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

November 2022

November 1	Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
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
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

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 NPTA 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 NPTA 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

BEING A BOARD OF DIRECTORS MEMBER

The PTA Board of Directors (Executive Board) establishes the framework within which everyone works. It is a team of volunteers who are members of the PTA and who are elected to office or appointed to chair a committee. They work together to set goals for the Local PTA Unit and to establish methods to achieve those goals. Effective teamwork requires mutual respect, knowledge of their role and the role of others, compassion, and commitment.

PTA Board members shall believe in and support the mission, purposes, values, and policies of National PTA and LAPTA. They must be a member of their Local PTA Unit within 30 days of the start of the membership year in which they serve. They will receive no compensation from the PTA except reimbursement for reasonable expenses as set forth in PTA policies and procedures. They will sign the Confidentiality, Ethics, and Conflict of Interest Policy on an annual basis. Board of Director members may not serve in more than two capacities and may hold only one elected office on the board.

Board of Directors Composition

Board of Directors shall consist of the elected officers, the chairs of standing and special committees, and the principal of the school or their designated representative. Other members may be designated in the Standing Rules.

Duties of the Board of Directors

Board members shall carry out the fiduciary responsibilities for this PTA by exercising the following:

- **The duty of care** requires each to use prudent care and concern of Board responsibilities, including but not limited to completing all components of required training, delivering all official materials to their successor or the President following the end of their term, and attending all meetings of the PTA.
- **The duty of loyalty** requires placing the interest of the PTA above any other, including but not limited to refraining from making any slanderous or defamatory statements that could harm the PTA name or brand, presenting a united front on decisions made as a Board of Directors, and maintaining confidentiality.
- **The duty of obedience** requires adherence to the law, and the PTA's mission and governing documents, including but not limited to complying with the legal filing requirements of the state and federal government agencies, reviewing the records retention policy annually, signing the Confidentiality, Ethics, and Conflict of Interest Policy, ensuring an annual budget for the upcoming fiscal year is prepared and submitted to the PTA for adoption at the annual meeting, abiding by the policies and procedures set by LAPTA, and performing the duties outlined by the governing documents and those assigned by the President.

All Board members are expected to come prepared for a productive Board meeting. In addition to having their specific position report ready to share, every Board member has additional responsibilities during the meeting. They should be ready to actively participate in the discussions during the meeting and read any reports or information distributed prior to the meeting such as the agenda, meeting minutes, and financial reports. PTAs utilize parliamentary procedure to ensure that everyone may express their opinions in a fair and positive manner. Participating in meetings means being ready to speak and listen.

Board meetings are closed meetings. Discussions and opinions shared in the meeting are confidential. Maintaining confidentiality not only builds trust among Board members but also preserves the Board meetings as a safe place to share all diverse opinions needed to make the best decisions. Only Board members attend Board meetings. Anyone may request the permission of the President to address the Board of Directors but is only allowed to ask a question, give a report, or provide information, and then they must leave the meeting. A non-Board member cannot participate in the discussion or the voting process.

The PTA Bylaws contain special provisions for emergency voting by the Board of Directors. These procedures must be followed for any vote by phone, email, video conferencing, or other means if authorized by the President.

QUORUM

Quorum must always be established to do certain business of the Board of Directors. For Board meetings, **quorum is defined as half of its filled positions plus one**, or a majority. For example, if there are 25 positions on the Board of Directors, but only 12 positions are filled, then the quorum is seven (half of 12 plus 1). If a person fills more than one position, they are only counted once when establishing the majority number. A Board member may temporarily assume the duties of a vacant position until that position is filled.

IMPORTANCE OF BOARDSMANSHIP

Serving on the Board of Directors extends beyond management and completion of position-specific duties. These specific duties are presented in this guide and are in the Bylaws and Standing Rules. Effective Board members know that in addition to satisfying requirements detailed in the PTA's governing documents, particular skills are essential to a well-functioning board such as a unified voice and collaboration.

It is important to have an awareness of how decisions and actions of individual Board members reflect on the perception of the entire Board by their PTA members, future PTA members and leaders, school staff, and the greater community. No matter the differences of opinion shared within the Board meeting, the PTA Board of Directors presents itself with a unified voice. Not doing so will undermine any efforts to gain support for PTA events and programs and to make a real difference in the school community.

Collaboration is also key and will requires that each Board member works in a complementary fashion, supporting all Board members' work in PTA. The structure of the Board and committees, utilizing parliamentary procedure to ensure all voices are heard, and requiring meetings, lends itself to a collaborative spirit in conducting the business of PTA. It is essential to share the responsibility of all PTA actions, messaging, programs, and events to project a positive opinion of PTA. From the outside, there should be no distinction between Board member responsibilities. The reputation earned by the PTA will be reflected on the entire Board, not on specific individuals. Working together to ensure that each Board member successfully executes their responsibility and participates in meetings goes a long way in establishing respect and support for PTA in the school community.

Positive relationship-building creates a unified voice and collaboration, among many other important skills. If there are good, strong, healthy relationships between Board members, the work of PTA will be successful and fun. The essential building blocks of relationship-building are mutual trust, respect, taking responsibility, valuing others, and open communication. In addition to building relationships amongst Board members, remember that the PTA's relationship with the school staff, district, families, and the greater community is essential to the success of the PTA. Effective management of these skills and the specific Board duties as described in this guide will ensure the success of the PTA and make excellent PTA leaders.

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!

GETTING STARTED

Congratulations! As a new Board member, get an early start to set yourself up for success. Each year, PTA leaders need to do the following shortly after their election or appointment.

- Make sure your PTA membership is current. All Board members must be PTA members during the school year for which they were elected or appointed.
- Register with LAPTA at LouisianaPTA.org/submit-officer-data-1.
- Meet with the outgoing Board members and review their binders and files together.
- Ask for the current copy of the PTA Bylaws and Standing Rules. The Bylaws must be reviewed locally and approved by LAPTA every three years.
- Follow LAPTA on social media. Familiarize yourself with the entire website at LouisianaPTA.org.
- Follow National PTA on social media. Create a profile on the National PTA website at PTA.org. Your account allows you access to the PTA Local Leader Kit and an incredible amount of resources.

Duties at a Glance

- Sign the Confidentiality, Ethics, and Conflict of Interest Policy annually.
- Contact your predecessor to request previous records and other relevant information to know what has been done in the past.
- Form your committees! Find people to help fill Board positions.
- Keep an organized binder to provide the successors with everything done throughout the year.
- Attend required LAPTA training and take advantage of e-learning available at PTA.org.
- Review and become familiar with the PTA Bylaws, Standing Rules, and the Active Affiliation Report.
- Act in emergencies between meetings of the Board.
- Make a report of committee action items at each Board meeting.
- Attend all monthly meetings of the PTA. Board of Directors, General Membership, and Committee meetings are scheduled throughout the year. Check the Bylaws for which months are required to have specific meetings. Your presence is necessary to ensure a quorum is met, and your participation is imperative to the success of the PTA.
- Present a report at Board and General Membership meetings relevant to your position.

Qualities of Effective Officers

- Understand and promote the purposes and policies of the PTA.
- Perform all duties of the office as outlined in the Bylaws and Standing Rules.
- Cooperate with the school administrator, staff, and others responsible for children.
- Study the material distributed by LAPTA and National PTA. A good place to start is PTA.org/local-leader-kit.
- Attend state and national leadership training and meetings.
- Make reports as required and file annual reports as part of the PTA's records.
- Return to Treasurer all funds pertaining to the office.
- Keep a procedure binder to pass on to succeeding officers. Transmit records, reports, and other material to succeeding officers in a timely manner.
- Protect members' privacy by not distributing membership lists to outside interests.
- Answer correspondence promptly.
- Stay informed by reading the publications of the PTA.

EXECUTIVE COMMITTEE

The Executive Committee consists of the elected officers of the PTA. They all assist the President to reach the goals of the PTA. The duties of officers are specified in the Bylaws and Standing Rules.

President directs the affairs of the PTA in cooperation with the other members of the Executive Committee and Board of Directors. See the *LAPTA Toolkit: President* for full details.

Vice-Presidents aid the President. The President may delegate specific programs such as Membership, Legislation, or Reflections Program to a Vice-President. A Vice-President can act in place of the President only when empowered to do so by the President or, if the President is unable to do so, when empowered to act by the Board of Directors.

Treasurer receives and disburses all money as the authorized custodian of PTA funds as prescribed in the Bylaws or authorized by the PTA. See *LAPTA Toolkit: Treasurer* for full details.

Secretary keeps accurate records of the proceedings of the PTA and is the custodian of the PTA records. See *LAPTA Toolkit: Secretary* for full details.

COMMITTEES

Committees are the working machinery of the PTA that plan and promote its activities. Each committee is headed by its appointed or elected "chair" based on their qualifications for the committee's field of work. It has a definite function and is subject to the control and direction of the PTA. The work and goals of the PTA determine the number and nature of the committees necessary. Refer to the Bylaws and Standing Rules for specific information about committees and the selection of committee chairs.

A terrific way to recruit new volunteers is through committees which are critical to the success of PTA. They provide an opportunity for individuals to do the work best fit for them. Members develop a sense of worth and personal satisfaction as they contribute to the total work of the PTA. Committee chairs are responsible for appointing their committee members with the approval of the Board of Directors.

Committees work effectively on many tasks. The procedures are informal, allowing individuals freedom to discuss and make greater contributions. Create an open, relaxed, and supportive environment. The size of the committee shall be small enough to allow for greater efficiency and flexibility and large enough to complete the task. In some cases, the Standing Rules specify the number of members on a committee.

A committee only has the authority that it is specifically given. Committees do not function as separate groups but are part of the PTA and must operate within the framework of PTA Bylaws, policies, and procedures. All projects and activities must have the approval of the Board of Directors and the PTA in advance.

Standing Committees perform work in specific areas continuously throughout the year. **Special Committees** perform work for a specific short-term purpose and cease to exist upon completion of the work. The following is a short list of committee suggestions, although a PTA may have other committees not listed.

COMMITTEE EXAMPLES

Advocacy Committee provides members with information about current legislative issues to foster effective participation in local, state, and national government; presents the PTA position on proposed laws that affect the education, health, and well-being of children to legislators at all levels; and works with other groups with similar interests. Visit PTA.org/local-leader-kit/mission/advocacy and LouisianaPTA.org/advocate for further details.

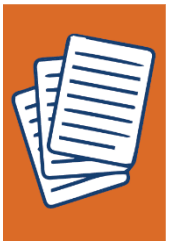
Budget Committee develops the PTA budget. The Treasurer acts as the chair. Two or more additional members are elected or appointed according to the Bylaws. The committee studies the previous year's budget and Treasurer's reports to determine how well the budget met the unit's needs. Next, they determine the projected financial requirements, considering the funds needed for programs, projects, and leadership development, and develop the proposed annual budget. PTAs are not fundraising organizations, but rather are educational advocacy organizations. PTA's major emphasis shall be on informing and educating members on issues related to children. The Treasurer must submit the budget to the Board and General Membership for approval. The committee may meet at various times during the year to determine if budget changes are necessary. Changes may only be made by amendment at a General Membership meeting. It is recommended that notice of such pending action be given prior to the meeting date. Learn more at LouisianaPTA.org/treasurer and PTA.org/local-leader-kit/finance.

Bylaws Committee reviews and revises the LAPTA Bylaws Template, noting the last approval date by LAPTA stamped on the cover page. Bylaws must be reviewed, updated, and submitted to LAPTA for approval every three years. LAPTA Bylaws guidance is available at LouisianaPTA.org/bylaws.

Communications Committee keeps the members and school families apprised of the PTA work and how they can play a part. This committee creates public awareness, understanding, recognition, and support of PTA goals and programs. Find tips and best practices to effectively share messages with fellow PTA members, school staff and administrators, community members, and the media at PTA.org/local-leader-kit/communications.

Reflections/Cultural Arts Committee emphasizes the benefits of arts education in the school and community. Members encourage participation in and administer the Local Unit Reflections Program and oversee other arts programs introduced by LAPTA. Find more information at PTA.org/home/programs/reflections/artsedtools and LouisianaPTA.org/arts-education.

Diversity, Equity, and Inclusion (DE&I) Committee works to build an organization that recognizes diversity and values differences and similarities among people through its actions and accountability. These characteristics include age, ethnicity, gender, language, culture, and socioeconomic status, among others. PTAs genuinely represent their communities when they respect differences, acknowledge shared commonalities uniting their communities, and develop meaningful priorities based on that knowledge. PTAs gain strength when they fully represent their communities through increased volunteer and resource support. Visit PTA.org/home/run-your-pta/Diversity-Equity-Inclusion.



Education Committee focuses on the enrichment and policy of education. It provides opportunities for students to enhance their knowledge, develop learning skills, and access other education needs. It advocates in the community on the issues that affect students' education, achievement, and school success. Visit PTA.org/home/family-resources and PTA.org/home/run-your-pta/how-we-pta/access-to-opportunities.

Family Engagement Committee helps strengthen, support, and sustain the involvement of families in the lives of their children. Families are the essential ingredient to ensure a high-quality education for every student. Decades of research shows that family engagement matters for student success. Students whose families are engaged are more likely to attend school, avoid discipline problems, achieve at higher levels, and graduate. Family engagement also helps schools. Research suggests it is equally as important as school leadership and a rigorous curriculum in school improvement. Learn about PTA's guiding principles of the 4 I's (Inclusive, Individualized, Integrated, and Impactful) of transformative family engagements at PTA.org/the-center-for-family-engagement/about#fouris and PTAs Leading the Way on Transformative Family Engagement.

Financial Resources Committee secures financial support for PTA programs through fundraising, sponsorship, donations, and grant submissions. The plan of work is based on the unit's goals with educational, social, or recreational value while reflecting the PTA's high principals. Information on appropriate fundraising is at PTA.org/local-leader-kit/fundraising/mission-driven-fundraising.

Healthy Lifestyles Committee educates parents about the physical, mental, and emotional health needs of children. Members of the committee offer educational resources and engagement opportunities that empower students and families to make better informed health decisions. It is the shared responsibility of families, schools, and communities to develop the "whole child." Together, they can ensure that every child is healthy, safe, engaged, supported, and challenged. National PTA publishes information on their Healthy Lifestyles initiative at PTA.org/home/programs/Healthy-Lifestyles and PTA.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being. Learn more about PTA responses to food insecurity at PTA.org/home/run-your-pta/how-we-pta/addressing-food-insecurity.

Student Involvement & Leadership Committee gives the student population the opportunity to gain experience and knowledge about leadership, advocacy and the legislative process, philanthropy, and PTA values and goals. Learn more about Student Involvement at https://www.PTA.org/home/run-your-pta/ptsa-resources.

Hospitality Committee develops a spirit of friendliness among members and others who may attend meetings; assists in discovering special talents and interests among members; assists in organizing special events and fosters a feeling of belonging among members. Members of the committee help to create a board that works as a team; and show children by example how teamwork can make their world a better place. Read more about transformative engagement at PTA.org/local-leader-kit/leadership/lead-the-pta-way.

Male Engagement Committee focuses on the importance of fathers and father figures in the success of our children. Increased involvement of men (including single fathers, non-custodial dads, home-schooling dads, custodial grandparents, and other concerned relatives) in their students' education causes student grades and test scores to improve, attendance to increase, and more student involvement in school activities. Father involvement is associated with children's better socio-emotional and academic functioning. Find a good starting point at Supporting-multicultural-membership-growth/Male-Engagement and the "ABCs of Male Involvement Handout."

Membership Committee builds an informed and active membership of the PTA. A growing and engaged membership is the foundation for achieving PTA's mission to make every child's potential a reality. Committee members are responsible for the year-long membership campaign that includes seeking out and involving people who may not have considered joining the PTA. Visit PTA.org/local-leader-kit/membership, PTA.org/home/run-your-pta/membership-resources, and LouisianaPTA.org/membership-tools for details to help guide this mission.

Nominating Committee has the important job of nominating candidates, which determines the course of the PTA in years to come. The Bylaws indicate when the committee is elected and the number of members who will serve. Any member of the PTA may be elected to the committee except the President. Committee members shall be informed, active, interested, and consider the welfare of the PTA above all else. The committee shall select the best qualified candidate possible for each office to be filled. Serving on this committee does not prevent a member from being chosen as a nominee. Guidance is provided at LouisianaPTA.org/bylaws.

Program Committee plans engaging, educational and fun opportunities that inspire, recognize, and impact all students and their families. National PTA provides in-depth toolkit guidance for local units to host age and grade level programs in-person and virtually. Discover more about them at PTA.org/home/programs. Find inspiration from programs hosted by PTA units at PTA.org/home/run-your-pta/how-we-pta#howwepta.

Room Representatives Committee serve as a liaison for the classroom and provide a personal contact between the PTA, parents, students, and teachers. This promotes the fourth Purpose of PTA which is to bring home and school into closer relation, so that parents and teachers may cooperate intelligently in the education of children and youth. The *Room Representative Coordinator* represents the group on the Board of Directors.

Teacher Appreciation Committee recognizes and celebrates teachers for their contribution to children and honors their dedication and passion for teaching children during Teacher Appreciation Week -- the first full week in May. National PTA provides new Toolkits each year to assist local units in celebrating their teachers – find them at PTA.org/home/events.

Other committees might be Volunteer, Website, Handbook, Library, and more.

ORIENTATION MEETING

The Board of Director's first meeting is an orientation for both new and returning members. It shall include:

- Welcome and introduction of members
- General overview of a good, functioning board, including dates, locations, and number of meetings members are expected to attend and the procedure to follow if they will be absent
- Importance of keeping a procedure binder
- PTA Basics with the structure, policies, and procedures of PTA, the Bylaws, and Standing Rules
- Procedures for reporting (who reports what and to whom)
- Role and responsibilities of board members: work with administrators and others with responsibility for children; attend PTA workshops and e-learning; respond to emails, memos, letters, and phone calls; participate at board meetings, including discussion, listening, voting, and abiding by and supporting decisions
- Policy that all Board Members must submit member dues to be on the board
- Overview of Deposit Form and Expense Form
- Proposed PTA calendar
- Board roster with emails and phone numbers
- Review and signature of Confidentiality, Ethics, and Conflict of Interest Policy

VIRTUAL MEETINGS

The PTA Board of Directors is authorized to meet on a virtual meeting platform, through electronic communications media, or telephone conference call with proper notice of the meeting in accordance with the Bylaws. All attendees must be able to hear and participate in the business being discussed. 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. No one shall attend in-person meetings virtually. Meetings may be recorded by one Board member, preferably the Secretary, for the purpose of accurately documenting business. There are specific guidelines for recording in your Bylaws.

SETTING GOALS

Goals give direction, establish priorities, and determine how to accomplish and evaluate a task, and they tell the who, what, when, where, and how. Goals should be specific, measurable, attainable, and have an established timeline. There are two types of goals: **Administrative Goals** deal with the running of the organization such as establishing a goal to increase membership by 10%; and **Program Goals** addressing the needs current families and communities have such as organizing a STEM+Families Science Festival.

It is wise to work with the principal and teachers and then survey the community to determine their concerns. If there is no need or no support for a program, it will not succeed no matter how good it may seem. After setting the goals, develop a plan of work and a master calendar of the year's activities.

FINANCE FOR BOARD MEMBERS

All Board members need to be knowledgeable of the following financial responsibilities of the PTA.

The Internal Revenue Service (IRS) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including Board member "fiduciary duty." Fiduciary is defined as "a person to whom property or power is entrusted for the benefit of another." Board members have three fundamental fiduciary duties: a duty of care, a duty of loyalty, and a duty of obedience.

- The duty of care means that the Board member actively attends and participates in Board meetings, is educated on the mission, purposes, and principles of the PTA, provides strategic direction, and oversees and participates in the day-to-day operations of the PTA.
- The duty of loyalty requires the Board member to operate in the interest of the local PTA and not use the position to further personal agenda.
- The duty of obedience requires the Board to know the state and federal laws and regulations that apply to PTA, including IRS regulations and guidance. Obedience requires a deep understanding of the operating documents such as the Bylaws, Standing Rules, and LAPTA Toolkit. Finally, obedience requires that the Board not act outside the scope of the PTA's legal documents.

Fiduciary responsibility in a PTA means the Board members act as trustees of the PTA's assets and must exercise due diligence to oversee that the organization is well-managed and that its financial situation remains sound. The Board verifies that all filing requirements and tax obligations are completed.

The budget creates the framework for program management and overall administrative decisions. An approved budget is always required for expenditures to be made and fundraisers to be conducted. The budget for the new year is presented and adopted by the membership at the first General Membership meeting of the year. The members always approve expenses and income via the budget, which can be amended as needed.

Payments and reimbursements are never made in cash and blank checks are never issued. All payments must relate to an approved budget item and have an Expense Form with a receipt attached. No other organization may pass its money through the PTA account, and money cannot be given to the school to spend at its discretion.

All deposits or monies collected are turned over to the Treasurer as soon as possible. Money is counted by at least two people at the same time, and both counters and the Treasurer each sign and keep a copy of the completed Deposit Form. The Treasurer may be one of the two counters.

Current financial reports with the actual vs. budget amounts are presented at Board of Director and General Membership meetings that covers the financials since the last meeting of that type. As the funds belong to the members, they have the right to access the financial reports presented at General Membership meetings.

Each bank statement is reviewed and signed by a person not authorized to sign on the bank account. The Secretary presents the result of this review at the Board meeting.

A financial audit occurs at the end of the fiscal year; when any authorized check signer is added or deleted on any bank account; or any time deemed necessary by the President or at least three members. The President motions to appoint the Financial Reconciliation Committee consisting of at least three members, who are not authorized signers, the current secretary, incoming Treasurer, nor be related by blood or marriage or reside in the same household as the authorized signers.

Insurance is strongly recommended by LAPTA for each local unit. Embezzlement (bond) policy covers people authorized to handle money and liability insurance covers losses through any fraudulent or dishonest acts. Insurance premiums are budgeted as an expense line. For these policies to apply, bank statements must be regularly reviewed by a non-signer and audit reports occur at least annually.

HOW BOARDS SUCCEED

Boards succeed when members have a good understanding of the organization and their role. The nominating committee should provide an accurate interpretation of responsibilities to potential nominees. The President should provide an orientation for all officers at the beginning of each term of office.

Boards succeed when they have a well-planned orientation for new and old members. Experienced board members need an annual update on the organization's work and accomplishments. New board members need to be introduced to the procedures of the board. All board members need to reflect on future plans in a positive atmosphere.

Boards succeed when they are neither too small nor too large. It is hard to conceive of a board getting the job done if it is simply too small and equally difficult to picture a successful board weighed down with too many members.

Boards succeed when they have established standing committees. Standing committees shall have an approved plan of work and shall operate throughout the school year.

Boards succeed when they have a long-range plan. A year-long plan provides an overall view of where the PTA is going. It ensures the continuity of programs and projects undertaken by the PTA.

Boards succeed because they have a process for self-evaluation. At least once a year the board shall review and evaluate the goals, accomplishments and problems of each committee and officer. This annual process should be tied to the long-range planning process. The review should form the basis for the annual report.

Boards succeed when they have provisions for eliminating nonproductive members. The Nominating Committee shall evaluate the participation and interest of board members and make appropriate recommendations for election. Between elections, organizations shall have a process in place to deal with nonproductive members.

Boards succeed when they have a planned rotation. Rotation prevents the ingrown possessiveness that sometimes occurs on self-perpetuating boards. New members bring innovative ideas and promote growth of the organization.

Boards are successful because of an effective Nominating Committee. The decisions made by the Nominating Committee determine who will lead the next group. This committee should be well organized, have a time schedule, and a planned working procedure.

LAPTA LEADERSHIP TRAINING

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, as well. 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.
2) **E-Learning from PTA.org**: Create an account. Under the *Run Your PTA* menu, select E-Learning. Submit a copy of the emailed completion certificate.
3) **LAPTA Training Videos**: Watch the training videos found at LouisianaPTA.org/videos. Upon completion, complete the online *Training Video Survey*. Submit a copy of the email you will receive of your survey answers.

PROCEDURE BINDER

A Procedure Binder is one of the most important basic tools in PTA work and is often the least used. LAPTA strongly urges all local units' officers and chairs to maintain an accurate and complete Procedure Binder for all work of the PTA. Since most new recruits have little or no experience on the job, the binder helps to identify the task and chart a course of action. A Procedure Binder tells of the history of the PTA and what the position entails. It is an up-to-date record that gives a foundation on which to build. If an officer or chair has not received a binder from their predecessor, now is the time to start one. Procedure Binder is the property of the PTA and not of the person who is using it.

A loose-leaf binder with dividers is essential. If materials will not fit in the binder, use an expandable folder. Each binder may be used for more than one year and be updated by the current user. Procedure Binders should contain calendars of school district, PTA events, LAPTA deadlines. Include resource materials such as the Bylaws, Standing Rules, approved budget, Board roster, summary of any passwords and accounts, Expense and Deposit Forms, and information from National PTA and LAPTA. Report, agendas, and minutes from all meetings should be included. Everything should have a place in the Procedure Binder.

EMAIL PROTOCOL

It is recommended that local units should create PTA email accounts for the Board which are handed down to successors. The use of personal accounts is discouraged. Passwords and accounts need to be known by the President and at least the Secretary.

When sending emails to a large list of people, use an email service such as MailChimp which is free. This way the recipients do not see everyone else's email address and it is a convenient and organized.

Email as a means of communication is subject to the same professional standards used in writing a letter or speaking as a PTA representative. Be careful what is said. Always include names, proper openings, closings, and "PTA" in the subject heading. Use the tagline *every***child**.*one***voice**.© Email is not to be used for discussing details of sensitive issues that relate to an individual's removal from office, hearings, or investigative meetings. Copy the President and/or Vice-President when appropriate and obtain the approval of the President if the email is considered important or being sent to many members.

Keep messages short when possible. Proofread the email and check for tone. Respond to email as soon as possible but not later than 3-5 days. If sending an attachment with the email, always include a message in the body of the email. Email should be courteous, concise, clear, communicate the message, have a cooperating tone, and spell checked.

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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

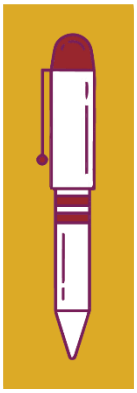
- **All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies.**
- Have at least two administrators for each site.
- Posts should be PTA-related such as flyers, events, grants, PTA and school 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.

PTA FAQS

Why should I join PTA?
PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. Being a member of PTA means that you are part of a powerful association and action plan that is focused on programs and initiatives that strengthen your child's education. PTA membership and dues support your child by funding essential educational and curriculum needs; advocating on behalf of children and educators at all levels; and building an inclusive school community. Join PTA for your child because increasing our membership, even by one, makes it possible to provide important educational resources and to create a stronger school community.

Where does my money go when I pay membership dues?
You become a member of the local PTA, Louisiana PTA, and National PTA. The dues directly support your child. PTA dues help fund essential school resources and curriculum needs. PTA dues support advocacy efforts at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. PTA dues support our work to strengthen connections between your family, your child's classmates and their families, and teachers to build a thriving and inclusive community for everyone.

Does PTA membership require volunteering and attending meetings?
The only thing required of you to be a member of PTA is to submit the annual membership dues. Beyond that, however you choose to PTA is up to you. PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. From volunteering at school events to participating in local, state, and national advocacy efforts to holding PTA leadership roles – the level of involvement is up to you. There is no wrong way to PTA!



How much time do I have to commit to being a member of PTA?
Membership in PTA can involve as much or as little time as you have to offer. There is no wrong or right way to PTA. Anything you can give, whether it's time or money, supports your child's potential.

Isn't PTA a social club for stay-at-home moms?
PTA is for every family with a child in school. PTA is for moms, dads, caregivers, grandparents, teachers, and the community. While some PTA work appears purely social including family events that are organized to strengthen school community, much of PTA's work focuses on funding essential school resources and curriculum needs, as well as advocating at all levels, which impacts your child's health, safety, and quality of education.

How does PTA ensure it represents every child and family at the school?
We encourage every family in the school to become a PTA member to support the success of their child. We want a diverse membership base that reflects all of the families and needs of students at the school. PTA strengthens connections between your family, your child's classmates and their families and teachers to build a thriving and inclusive community for everyone.

How does PTA impact my child?
PTA provides schools access to experts, resources, trainings, and dozens of nationally recognized educational enrichment programs that impact a child's education such as the Family Reading Experience, in partnership with the Reading is Fundamental. PTA funds the nation's largest and longest running student arts program, Reflections®, which provides students access to arts, music, literature, dance, drama, and visual arts. PTA's national advocacy efforts have helped establish universal kindergarten and the National School Lunch Program, the juvenile justice system and anti-child labor laws.

How do you advocate at the national, state, and local levels and why is it important to my child?
PTA is active at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. During the past 120 years, PTA's national advocacy efforts helped establish universal kindergarten, the National School Lunch Program, the Juvenile Justice System, and anti-child labor laws.

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 don't 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 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 to 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.

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.

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

Date	Board Member Name	Position	Signature

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit **LouisianaPTA.org/bylaws** for details. Bylaws not in compliance will be returned to local unit. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments made in PDF format to **Bylaws@LouisianaPTA.org**. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President's email.

Local Unit Name _____ Local Unit Parish _____ Local Unit LUR# _____

President's Email _____ President's Phone _____

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

Choose one.
The Local Unit PTA is: ☐ Existing PTA ☐ Reinstated PTA ☐ New PTA

Choose all that apply.
☐ The Bylaws approved by the General Membership are attached.

☐ List approved amendments below including the article heading, section number, and line number(s).

_____

_____

_____

_____

☐ If more space is needed for amendments, check here for the attached addendum.

President's Signature _____ Secretary's Signature _____

President's Name _____ Secretary's Name _____

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to **Bylaws@LouisianaPTA.org** in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final approved document to the President's email.

Contact Bylaws@LouisianaPTA.org with any questions.

INVENTORY ACCOUNTABILITY FORM

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

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

Quantity	Value	Name	Item Description	Note

We agree to the findings of this Inventory Accountability Form:

Date _____ Person #1 Signature _____ Person #2 Signature _____ of Page(s) _____

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

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 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.

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 aafiles@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: _____ Submitted to LAPTA Date: _____

❒ LEADER DATA: Board data was not submitted to LAPTA at https://form.jotform.com/221275677028157.
New deadline: _____ Submitted to LAPTA Date: _____

❒ BYLAWS: Bylaws are outdated or were not submitted.
New deadline: _____ Submitted to LAPTA Date: _____

❒ TAXES: IRS taxes were not filed.
New deadline: _____ Submitted to LAPTA Date: _____

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

❒ AUDIT REPORT: Audit Committee Report was not filed.
New deadline: _____ Submitted to LAPTA Date: _____

❒ ARTICLES OF INCORPORATION: Active Annual Report from LA Secretary of State was not filed.
New deadline: _____ Submitted to LAPTA Date: _____

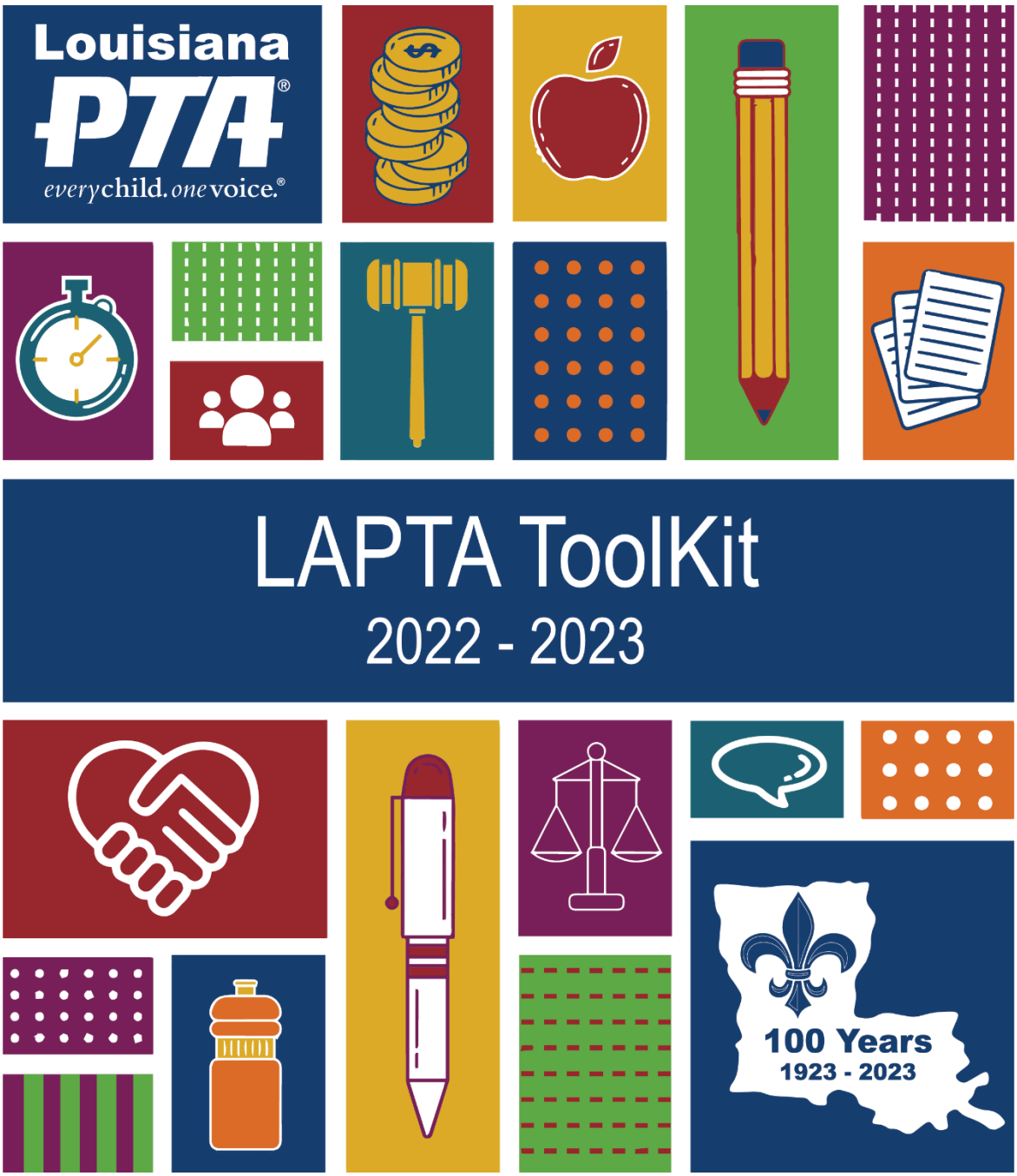
❒ TRAINING: Proof of PTA Leadership Training for all elected officers was not filed.
New deadline: _____ Submitted to LAPTA Date: _____

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.

Louisiana PTA
1923
2023
100 Years
Here We Geaux!



Membership

2022 – 2023

Section 6

INDEX

About National PTA 3
Leadership Traits 4
Introduction 4
Membership Campaign Theme 5
Membership Dues 5
Membership Resources & 9 Reasons to Join PTA 6
Create Your Own PTA Value Message 7
Getting Started 10
Membership Chair Duties 10
Membership Ask Note or Email 11
Procedure Binder 11
Monthly Challenges 12
Annual Membership Awards 12
Centennial Button Pins 12
Membership Graphics 13
Submit Membership Dues 14
CheddarUp and MoneyMinder 15
Membership Calendar 16
LAPTA Important Dates and Deadlines 18
Why You Should PTA 20
Communications and Social Media 21
Customize the PTA Logo 21
Membership Hashtag and Email Signature 21
Sample Membership Ask Email 21
Sample Membership Ask Note 22
Sample Membership Thank You Email 23
Sample Membership Thank You Note 23
Roster Sign-In Sheet 24

Louisiana PTA®
everychild. onevoice.®
100 Years
1923 - 2023

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

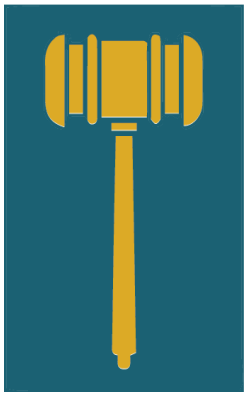
e effective leaders. Their skills and abilities allow them to step into a variety of roles, and they see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to continually improve. As Treasurer, you are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

INTRODUCTION

Today, PTA's role is more important than ever in connecting parents, teachers, and administrators and supporting critical school needs. One goal of PTA is to make visible its often invisible work by highlighting the value and impact of PTA on individual children and emphasizing that membership involves as much or as little time as one has to offer.



Membership is the foundation of PTA. As membership chair, you are the one most responsible for enrolling as many new members as possible for PTA. Yours is one of the most important duties in the entire organization, for nothing can happen without members. Membership is open to anyone who believes in the National PTA Mission and Purposes. PTA is committed to being inclusive in its efforts to represent and assist all who nurture and educate children. It not only welcomes but actively seeks in its membership the widest diversity of cultures, races, ethnicities, creeds, and economic and educational statuses. National PTA is the largest and oldest nonprofit, volunteer, child-advocacy organization in the country. Its purpose is to make better lives for all children and youth. Because the membership of the PTA comes from such geographically, culturally, and economically diverse backgrounds, this organization has the true potential to help every child.

This Membership Toolkit outlines how to best communicate about the value of PTA membership. This campaign is built to bolster your existing membership recruitment work with consistent messaging and customizable, dynamic visuals to use in emails, on your website, and on social media channels. Visit PTA.org and select Membership Resources under the "Run Your PTA" menu for graphics, resources, and documentation. We cannot thank you enough for the work you do on behalf of PTA. This new campaign theme will increase membership and allow you to build on the important work you are doing!

MEMBERSHIP CAMPAIGN THEME

Visit PTA.org and select Membership Resources under the "Run Your PTA" menu where you can find graphics, resources, and support documentation. While a Local PTA Unit can choose their own annual membership theme, National PTA chose a clear and concise phrase to motivate and recruit new members and reinforce the value of PTA membership. The overarching membership theme is **PTA For Your Child**. The other new theme for the year by National PTA is **You Belong in PTA**.

PTA For Your Child or You Belong in PTA

This overarching message serves as the basis for all campaign messaging. The number one reason people did join PTA was because no one asked them! PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. Being a member of PTA means that you are part of a powerful association and action plan that focuses on programs and initiatives that strengthen your child's education and the family-school partnership. However you PTA, it's all an investment in your child. PTA to support your child's teachers and curriculum. PTA to advocate on the issues impacting your child and affect change at the local, state, and national levels. PTA to build a stronger, more diverse, and inclusive school community. There is no wrong way to PTA, and we invite every family to participate, because we can do more together than apart. *How do you PTA?*

PTA is no longer a noun. It's a verb, an action plan working to support your child's success! It's an invitation to every family in every school to participate, because we can do more together than we can do apart. There's no wrong way to PTA, just as long as you're doing it for your child. You can give money by joining and donating. You can volunteer time and effort. Or you can help grow our presence at the local, state, or national level as an advocate for improving your child's education.

MEMBERSHIP DUES

When someone joins a Local Unit, they also become a member of Louisiana PTA (LAPTA) and National PTA. Each unit submits to LAPTA the portion of dues collected for state and national dues. Currently, that is $3.50 per member. National PTA receives $2.25 and LAPTA receives $1.25. LAPTA has the responsibility of forwarding National PTA's portion. National PTA and LAPTA dues must be submitted for each member. The Local Unit is obligated to remit dues for every person who joins their PTA. A unit's Active Affiliation could be in jeopardy if it, for example, it collects dues from 100 members but only remits dues to LAPTA for 30.

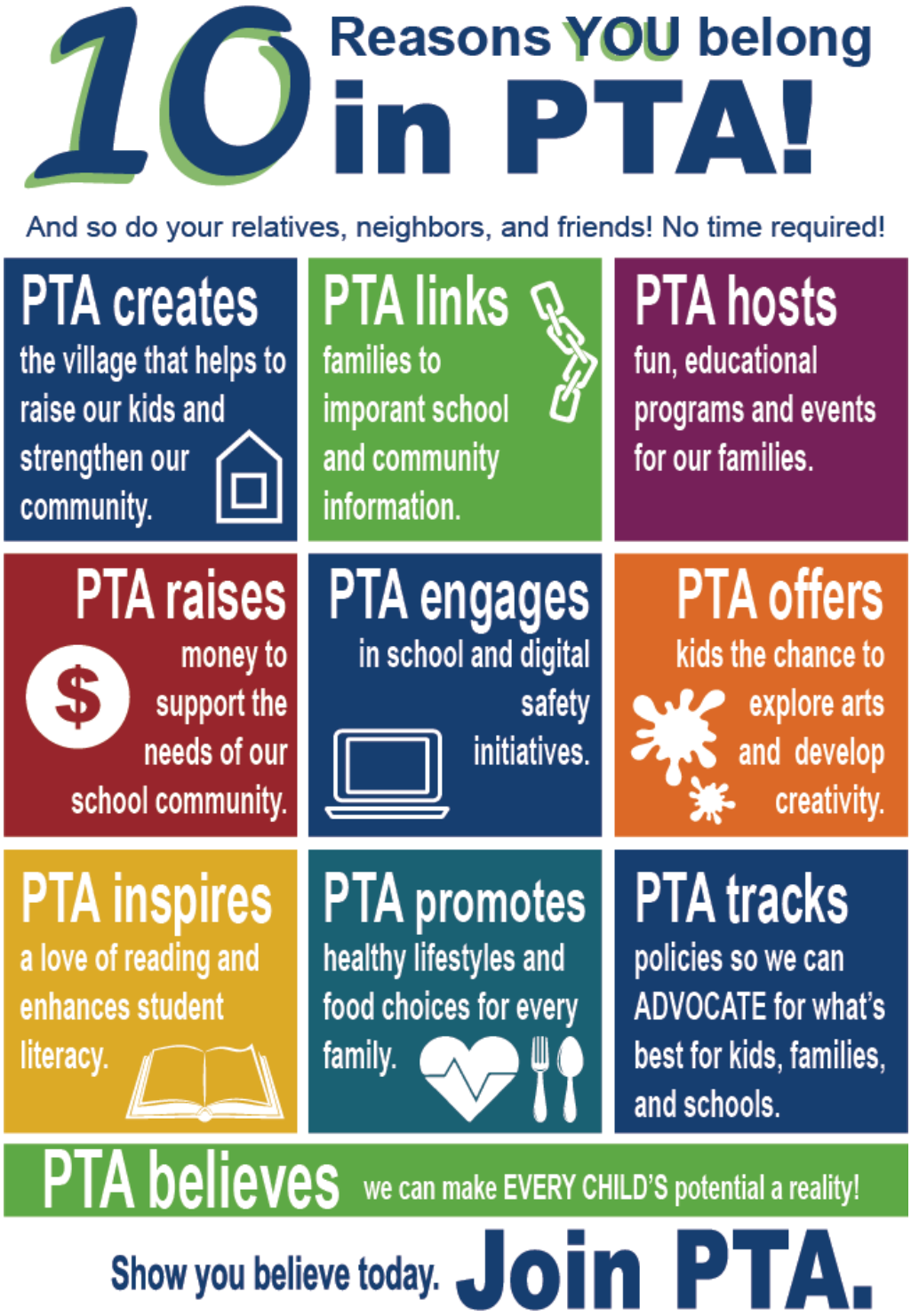
Membership in a unit is required for the privilege of voting, holding office, and attending the LAPTA and National PTA Conventions as a voting delegate. Board members are required to submit membership dues. See the Roster Form at the end of this section to help track who still owes dues. Joining one PTA does not give voting privileges in another PTA. Dues must be submitted to each separate PTA. Membership is valid from date of issue through June 30 of each year.

The Treasurer shall deposit any checks or cash collected from the membership drive at their school as soon as possible. Memberships shall be submitted monthly to LAPTA. March 15 is the cut-off date to qualify for LAPTA membership awards. Dues received after March 15 are included in the current year's total members to National PTA but are not considered in the count for membership awards. See "Submit Membership Dues" in this section for details on submitting member dues to LAPTA.

The LAPTA and National PTA's portion of a unit's dues of $3.50 are not part of a unit's gross income. Only the portion the unit charges above the $3.50 is considered income when reporting income to the IRS.

MEMBERSHIP RESOURCES

For the most current campaigns, tools, learning videos, documentation, and more, go to PTA.org/home/run-your-pta/membership-resources. Download the graphic below from LouisianaPTA.org/membership or right click the graphic in the Word file for the LAPTA Toolkit: Membership and select "Save as Picture…."



CREATE YOUR OWN PTA VALUE MESSAGE

When seeking PTA members, remember to always make an explicit Ask to Join. Clarify what PTA membership means and that it is different from volunteering. Remember that *everyone* belongs in PTA, and that *everyone* is interested once they understand the association's value and role.

To create a custom PTA message, use the following three high-value areas for the different audiences your PTA wants to recruit. For each value, answer three questions and then combine into a Value Message. Below are sample answers put together to create an impactful statement.

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

Value 1: Our PTA Creates Connections

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

Our PTA Creates Connections

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

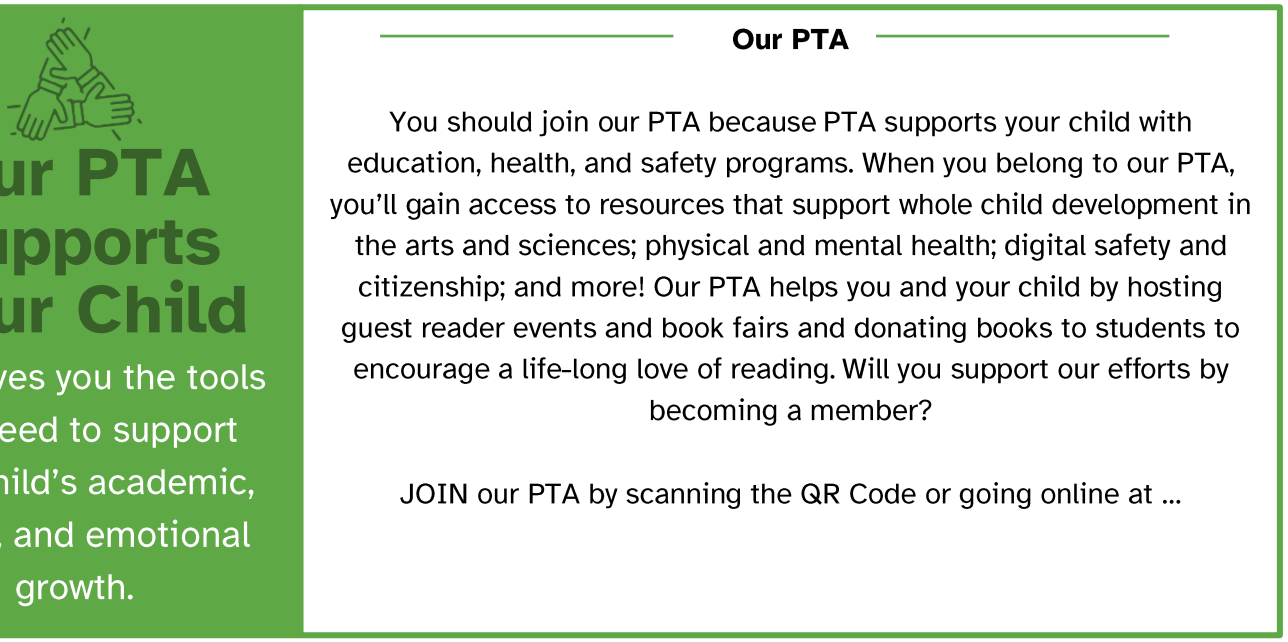
Our PTA

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

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

CREATE YOUR OWN PTA VALUE MESSAGE #2

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



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

CREATE YOUR OWN PTA VALUE MESSAGE #3

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

The above message is consolidated into the following graphic.

Our PTA Amplifies Your Voice

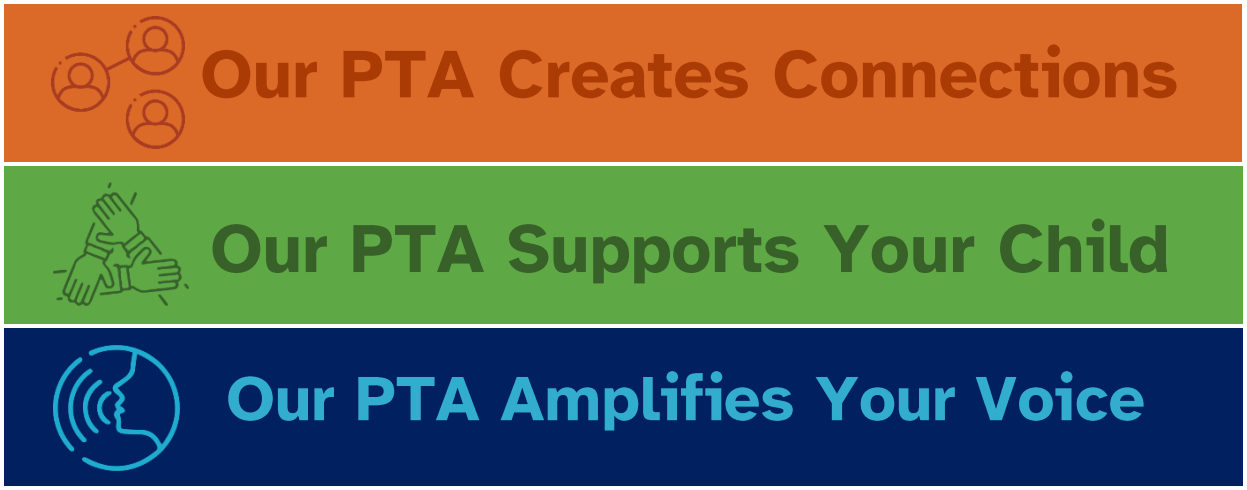
As part of a national association, your PTA membership supports child advocacy efforts in our community, our state, and the nation.

Our PTA

You should join our PTA because PTA amplifies your voice through collective impact. We can do more together than we can apart! When you belong to PTA, learn what you can do to positively impact students, families, and schools, as well as education programs and services. PTA advocacy helps you, your child, and all children because our PTA Connect with a nationwide network of PTA advocates and a wide array of influential individuals and organizations. Will you support our efforts by becoming a member?

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

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



GETTING STARTED

Whether you have more volunteers than you can manage or just a few dedicated folks, you can build a vibrant and robust membership in your PTA. Growing membership is the most critical function in any PTA. Create quick and early momentum with these steps!

Quick-Start Actions
Email all executive board members, teachers, and last year's members inviting them to re-join for the new year. Speak to the previous membership chair and ask for a copy of the previous year's roster. There are even Membership Awards available. Challenge each executive board member to recruit five members or more.

Ask the principal to routinely promote the value of PTA to the faculty and promote the PTA on the school marquee and other campus advertising opportunities. Ask each school board member to join your PTA. Provide the school office with extra PTA welcome letters and membership packets for new families.

Work with a committee to develop a plan to accomplish your membership goals. Take advantage of all the free resources provided by LAPTA to make your job easier. Visit PTA.org under the Membership menu for lots of ideas and support documents.

MEMBERSHIP CHAIR DUTIES

- ❒ Register online with LAPTA at **LouisianaPTA.org/submit-officer-data-1**.
- ❒ Regularly submit dues and membership rosters at LouisianaPTA.org/membership.
- ❒ Attend all meetings.
- ❒ Understand and share the value that a thriving membership brings to the school and community.
- ❒ Form a committee to help plan, recruit, and recognize members.
- ❒ Use National PTA's annual theme *(PTA For Your Child)* or develop your own messages.
- ❒ Invite every family and faculty member to join PTA.
- ❒ Provide repeated opportunities for people to join at every PTA event, on social media, and in all PTA communications.
- ❒ Distribute membership thank you notes with membership benefits listed at PTA.org to all members.
- ❒ Before each meeting, provide the Secretary with the most current membership roster.
- ❒ Frequently update your school families, local community, and businesses on progress toward your goal.
- ❒ Celebrate your membership successes with the school and on social media.

Setting Goals
LAPTA has a goal for each Local PTA Unit to grow by at least ten percent from the previous two year's average. Work with the committee to set recruitment goals to keep everyone focused and on track for success. Ask yourself how people will join. Some PTAs have online purchase options on platforms such as CheddarUp.com, plus traditional envelopes, Membership Packets, emails, social media, and more. Have sign-up tables at Open House or Meet the Teacher events. Continue to recruit throughout the year. Ask local businesses, extended family, local government, and community leaders. Make a good first impression to positively shape how members perceive PTA. This will set the tone to improve support, engagement, and membership renewal in future years.

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

Top 10 Reasons People Join PTA by Rank:

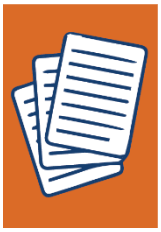
1. Supporting my local school
2. Taking an interest specifically in my children's education
3. Taking a general interest in the education of children
4. Staying informed on local campus news
5. Connecting with teachers and administrators
6. Connecting with other parents and community leaders
7. Supporting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

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

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

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

MEMBERSHIP ASK NOTE OR EMAIL



Create a dynamic Membership Welcome Packet at the start of school which can contain everything PTA for the upcoming year. Create a concise form for members to join PTA. Offer online options to join on a platform such as CheddarUp.com. PTA.org has a wealth of resources, graphics, and documentation for membership. Click *Membership* under the "Run Your PTA" menu. The only personal information needed is their first and last name and an email. A sample "membership ask" and thank you note and email are at the end of this section.

PROCEDURE BINDER

Create a Procedure Binder for membership using the previous Membership Chair's binder or start a new one.
Tab 1: Include a summary of any accounts and passwords and the Board roster.
Tab 2: LAPTA Toolkit: Membership plus Sections 1 and 5, Bylaws, and Standing Rules
Tab 3: Membership Reports (Rosters)
Tab 4: Agendas & Minutes
Tab 5: Notes, email campaigns, Welcome Packet, and other membership materials
Tab 6: Deposit Forms and Expense Forms from the Treasurer
Tab 7: Other

MONTHLY CHALLENGES

LAPTA has a goal of 12,100 members for our 100th year in 2022-23, and we need our Local PTA Units to help us reach that goal. To be eligible for awards, PTAs must have Active Affiliation status. The monthly challenges will be automatically determined by LAPTA. All qualifying PTAs will receive a certificate and put into a monthly drawing for $100 gift to the PTA.

August

Early Bird Award

Submit 25 members by August 31 plus Officer Data at LouisianaPTA.org/submit-officer-data-1

September

Membership Head Start Award

Jump start the PTA with 50% or more of the previous year's PTA membership by September 30

November

Geaux PTA Award

Achieve more than 100% of the previous year's PTA membership and completed Active Affiliation Packet by November 30

December

Lagniappe Award

Achieve 125% of the previous year's membership and completed Active Affiliation packet by December 31

January

Welcome Back Award

Keep up the momentum with ten new members by January 31

February

Founders' Day Membership Challenge

In honor of our PTA Founders on February 17, add 17 new members by Feb 28

ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 12,100 members for our 100th year in 2022-23 and we need our Local PTA Units to help us reach that goal! The annual membership awards will be announced at the General Membership Meeting on March 25. Membership rosters must be submitted by March 15 to office@LouisianaPTA.org. Complete the *Annual Membership Awards Application* form at the end of this section for the applicable awards.

Super Grower

Greatest increase from previous year

Membership Marvel Award

Increased membership by 10% over the previous year

Golden Apple Award

100% membership of teachers and administrators

Platinum: One Voice for Every Child Award

Recruit members equal to 100% of student enrollment

Gold: One Voice for Every Child Award

Recruit members equal to 75% of student enrollment

Silver: One Voice for Every Child Award

Recruit members equal to 50% of student enrollment

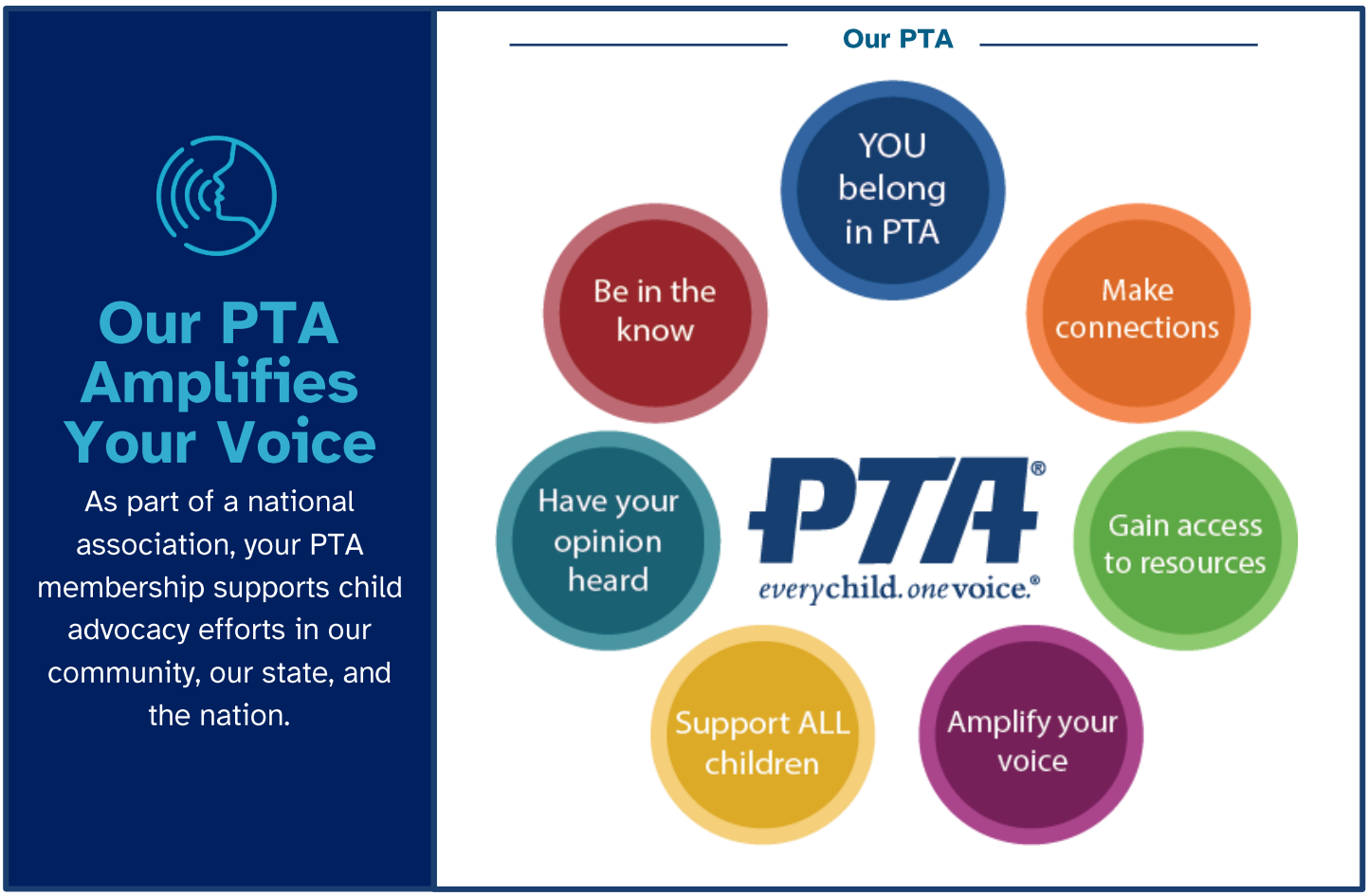
CENTENNIAL BUTTON PINS

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!

MEMBERSHIP GRAPHICS

This image is a flash gif. You can download or save the image from the Word file. Right-click and select “Save as Picture…”.

For the second image, add your PTA name and edit as needed. Right-click and select “Save as Picture…”.



SUBMIT MEMBERSHIP DUES

Only members have the right to bring motions, debate, and vote on PTA business at General Membership meetings. In addition, the local PTA may offer member-only benefits like a directory, no-waiting access at events, discounts on school supplies or spirit wear, etc. Because people can join in a variety of ways, it is important to create one master roster that is shared with the President, Treasurer, and Secretary. The membership roster should not be shared elsewhere.

1. The first step to processing memberships is to go to LouisianaPTA.org/submit-unit-dues. Click "PAYMENT LINK" which brings you to CheddarUp.com. Purchase the number of individual memberships sold by the PTA. The cost is $3.50 each. Local Units must purchase a minimum of 30 memberships from LAPTA per year The exact number of memberships sold to their members must be purchased. It is important to properly account for all members. LAPTA forwards the National PTA dues portion of $2.25 to National PTA.
2. Download the Excel spreadsheet called "LAPTA Local PTA Membership Report" by going online to LouisianaPTA.org/membership. This is the format used for Membership Reports. *See below.* Rename the file with the [PTA name] Member Report [date]. In the spreadsheet, enter the information in the top section and then last name, first name, and email for every member into the spreadsheet. After submitting dues, **email the Membership Report to office@LouisianaPTA.org.**
3. Repeat the process above monthly. Memberships are good for one year, expiring on June 30.
4. Send out a thank you note to all members by email or paper note at least monthly. Include LouisianaPTA.org and PTA.org for members to check out. A sample is at the end of this section.

LAPTA LOCAL UNIT MEMBERSHIP REPORT 2022-23

After submitting dues, email this Member Report to office@LouisianaPTA.org.

PTA Name:		Today's Date:	
School Name:		School's Student Count:	
School City:		School's Teacher/Admin Count:	
School Parish:		Your PTA's Membership Goal:	
Your Name:		Total Memberships Year to Date:	
Your Email:		New Memberships for this Report:	

Member Last Name	First Name	Email Address
Last	*First*	*Email*
Last	*First*	*Email*
Last	*First*	*Email*
Last	*First*	*Email*

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 w 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. 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 Deposit Form.

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

CheddarUp has the Basic entry level account that is free. If you plan to sell items such as tshirts 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

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.

MEMBERSHIP CALENDAR

July

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

August

- ❒ Target your school faculty to join PTA before the first day of school. Give the faculty a summary of what PTA plans to do for them throughout the year and why they should join and support PTA.
- ❒ Attend LAPTA leadership training.
- ❒ Implement your membership enrollment campaign.
- ❒ Make sure every Board member joins PTA. They must be a member to be on the Board of Directors.
- ❒ Publicize! Use all media – email, Facebook, Instagram, Twitter, newspapers, billboards, radio and TV.
- ❒ With the principal's permission, publicize your membership campaign by displaying posters in halls.
- ❒ Have your campaign materials ready for the first day of school and for registration.
- ❒ Secure lists of teachers and classroom counts from school secretary.
- ❒ Have enrollment tables for the first event that parents attend. Have plenty of change on hand.
- ❒ Use posters and artwork to keep noticeably displayed membership campaign progress.
- ❒ Keep a membership roster using the Excel spreadsheet at LouisianaPTA.org/membership.
- ❒ Send the treasurer all dues money as soon as it is received.
- ❒ **Early Bird Award:** Submit 25 members plus Officer Data at LouisianaPTA.org/submit-officer-data-1

September

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

October

- ❒ Work with program chairman and plan to have a parent education program to reach more members.
- ❒ Put articles in PTA, school, or community newsletters.
- ❒ Enroll parents, students, staff, bus drivers, grandparents, school board, community leaders, businesses, etc.
- ❒ Continue to publicize PTA and update members on progress.
- ❒ Give the school office extra Welcome Packets to give to new students when they enroll in school.
- ❒ Provide the membership roster to the Secretary and Treasurer.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

November
- ❒ Continue to make personal contacts with parents and teachers who have not joined.
- ❒ Inform Local Unit of progress toward goals.
- ❒ Be sure a membership table is set up at all PTA meetings and activities.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- ❒ **Geaux PTA Award:** Achieve more than 100% of the previous year's membership and Active Affiliation Packet

December
- ❒ December 15th is the deadline for the Early Bird Award.
- ❒ Submit member dues at LouisianaPTA.org/membership for LAPTA and National PTA.
- ❒ Relax and enjoy the holidays.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- ❒ **Lagniappe Award**: Achieve 125% of the previous year's membership and completed Active Affiliation packet

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

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

March
- ❒ **March 15 is the deadline for Membership Reports for awards. Prepare applications for any awards.**
- ❒ **Membership awards announced March 25 at the LAPTA Centennial Celebration in Baton Rouge.**
- ❒ Remind the Treasurer to submit final membership dues to qualify for state awards.
- ❒ Provide the membership roster to the Secretary and Treasurer.
- ❒ Begin preparing Procedure Binder for the next chairman.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

April
- ❒ Attend the LAPTA Awards Ceremony to receive membership awards.
- ❒ Evaluate the year's progress, make written recommendations for next year, and finish your procedure book.
- ❒ Work with incoming chairman to plan recruiting ideas for spring pre-registration.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

May
- ❒ Celebrate your success. Thank you for a great job!
- ❒ Pass your procedure book and other records to your successor.
- ❒ Breathe a sigh of relief and let go graciously.
- ❒ Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

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
July 25	"Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
July 25	Submit new membership dues at LouisianaPTA.org/membership

August 2022

August 1	Reflections Program opens at LouisianaPTA.org/reflections-program
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**
August 25	Submit new membership dues at LouisianaPTA.org/membership
August 27	**LAPTA Leadership Training North for northern Local PTA Units**
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: 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

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

November 2022

November 1	Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
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
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

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 NPTA 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 NPTA 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

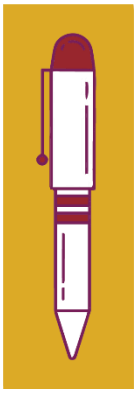
June 1	Search, share, and publicize Summer Learning Programs at PTA.org and your local community
June 12	"Ask LAPTA" Zoom Meeting at 12:00 pm and 7:00 pm
June 22–25	National PTA Virtual Convention (tentative dates)
June 25	Submit new officer data at LouisianaPTA.org/submit-officer-data-1

WHY YOU SHOULD PTA

Why should I join PTA?
PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. Being a member of PTA means that you are part of a powerful association and action plan that is focused on programs and initiatives that strengthen your child's education. PTA membership and dues support your child by funding essential educational and curriculum needs; advocating on behalf of children and educators at all levels; and building an inclusive school community. Join PTA for your child because increasing our membership, even by one, makes it possible to provide important educational resources and to create a stronger school community.

Where does my money go when I pay membership dues?
You become a member of the local PTA, Louisiana PTA, and National PTA. The dues directly support your child. PTA dues help fund essential school resources and curriculum needs. PTA dues support advocacy efforts at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. PTA dues support our work to strengthen connections between your family, your child's classmates and their families, and teachers to build a thriving and inclusive community for everyone.

Does PTA membership require volunteering and attending meetings?
The only thing required of you to be a member of PTA is to submit the annual membership dues. Beyond that, however you choose to PTA is up to you. PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. From volunteering at school events to participating in local, state, and national advocacy efforts to holding PTA leadership roles – the level of involvement is up to you. There is no wrong way to PTA!



How much time do I have to commit to being a member of PTA?
Membership in PTA can involve as much or as little time as you have to offer. There is no wrong or right way to PTA. Anything you can give, whether it's time or money, supports your child's potential.

Isn't PTA a social club for stay-at-home moms?
PTA is for every family with a child in school. PTA is for moms, dads, caregivers, grandparents, teachers, and the community. While some PTA work appears purely social including family events that are organized to strengthen school community, much of PTA's work focuses on funding essential school resources and curriculum needs, as well as advocating at all levels, which impacts your child's health, safety, and quality of education.

How does PTA ensure it represents every child and family at the school?
We encourage every family in the school to become a PTA member to support the success of their child. We want a diverse membership base that reflects all families and needs of the students at the school. PTA strengthens connections between your family, your child's classmates and their families and teachers to build a thriving and inclusive community for everyone.

How does PTA impact my child?
PTA provides schools access to experts, resources, trainings, and dozens of nationally recognized educational enrichment programs that impact a child's education such as the Family Reading Experience, in partnership with the Reading is Fundamental. PTA funds the nation's largest and longest running student arts program, Reflections®, which provides students access to arts, music, literature, dance, drama, and visual arts. PTA's national advocacy efforts have helped establish universal kindergarten and the National School Lunch Program, the juvenile justice system and anti-child labor laws.

How do you advocate at the national, state, and local levels and why is it important to my child?
PTA is active at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. During the past 120 years, PTA's national advocacy efforts helped establish universal kindergarten, the National School Lunch Program, the Juvenile Justice System, and anti-child labor laws.

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*every***child**.*one***voice**). 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. Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

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

Mandeville High PTSA everychild. onevoice.®

HASHTAG AND EMAIL SIGNATURE

Use the PTA For Your Child hashtags in your membership recruitment social media posts to engage followers. Encourage members of the executive board and PTA members to use the campaign hashtags in their own membership-related posts.
#PTAForYourChild, #HowDoYouPTA
PTA For Your Child

PTA FOR YOUR CHILD
National PTA
everychild.onevoice.

Insert the following ***PTA For Your Child*** email signature into emails sent on behalf of the PTA. Hyperlink image to PTA registration page.
[NAME], [PTA LEADERSHIP POSITION]
[PTA NAME]
[PHONE NUMBER], [EMAIL ADDRESS]
How Do You PTA? PTA For All Children! [Tagline of your choice]

SAMPLE "MEMBERSHIP ASK" EMAIL

SUBJECT: PTA For Your Child!
Hello! It's time for another exciting school year to start and an important part of Madisonville Junior High is our PTA. MJH PTA supports critical academic needs, is an active voice on decisions that impact your child's health, safety, and quality of education, and builds a stronger, more inclusive school community. We invite you to join and ***PTA For Your Child*** because increasing our membership, even by one, makes it possible to do:

- Mental Health Event
- Literacy Program
- Used Uniform Sales
- Tutoring Program

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

PTA FOR YOUR CHILD
National PTA
everychild.onevoice.

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

SAMPLE "MEMBERSHIP ASK" NOTE
MHS PTSA Membership Sign up

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

- Mental Health Speaker
- Breakfast of Champions
- Staff Appreciation Lunches
- $25 Teacher Mini-Grants
- Campus Beautification
- Skipper Scholar Breakfast

There are many ways to PTA. Anything you can give, whether it's time or money, will support your child's potential. We invite you to join because we can do more together than apart. Members of MHS PTSA are also members of **National PTA** and **Louisiana PTA** (who is 100 years old this year)! For member benefits, see PTA.org.

MHS PTSA MEMBERSHIP

Student Name: _____ 1st Hour Teacher: _____
Adult Name: _____ Relation to Student: _____
Email: _____ Phone: _____
Membership Type: ☐Student ☐Parent ☐Grandparent ☐Staff ☐Business ☐Other: _____

Adult Name: _____ Relation to Student: _____
Email: _____ Phone: _____
Membership Type: ☐Student ☐Parent ☐Grandparent ☐Staff ☐Business ☐Other: _____

For Business Memberships, Business Name: _____
Email: _____ Phone: _____
Address: _____

Choose Membership Type and Quantity:

☐ $25 Business Quantity: _____
☐ $7 per Student Quantity: _____
☐ $10 per Adult Quantity: _____
☐ $10 per Staff Quantity: _____

Total Dues Attached: $_____

Cash or check to MHS PTSA, or credit cards at Mandeville.CheddarUp.com.

DONATIONS are greatly appreciated!

_____ Student Rewards
_____ Student Mental Health Program
_____ Teacher Programs
_____ Hospitality

Total Donation: $_____

I'D LIKE TO VOLUNTEER FOR

❒ General Volunteer
❒ Lunchbox Spirit Wear
❒ Office Volunteer
❒ Breakfast of Champions
❒ Cultural Arts
❒ Compass Weekly E-Flyer
❒ Hospitality
❒ Library
❒ Membership
❒ Parliamentarian
❒ Talent Show
❒ Skipper Scholar Breakfast
❒ Student Care/Mental Health Program
❒ Skipper Scoop Newsletter
❒ Mental Health Committee

Name	Phone	Email

Complete and return this form with any member dues to the 1st hour teacher or turn in at Student Services or go online to Mandeville.CheddarUp.com to submit information and payment.

SAMPLE THANK YOU EMAIL AND NOTE

SUBJECT: PTA For Your Child Thank you!

Thank you and congratulations! You are now a member of MHS PTSA, Louisiana PTA, and the National PTA. Check out **PTA.org** and **LouisianaPTA.org** for member benefits. Because of you, MHS PTSA will be able to support essential educational and curriculum needs, advocate on behalf of your child at the local, state, and national level, and build an inclusive school community for all families. Your PTA dues directly support:

- Three-in-a-row Honor Roll Picnic
- PBIS Buck Stop
- Teacher Appreciation Luncheons
- Library Literacy Program

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

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

PTA FOR YOUR CHILD

National PTA everychild.onevoice.

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#PTAForYourChild
How Do You PTA? PTA For All Children!

Mandeville High PTSA everychild.onevoice.

MHS PTSA Membership Thank you!

Student/Member Name

Teacher Grade

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

YOU BELONG IN PTA

UNITE | SPEAK | ADVOCATE | CHAMPION | CONNECT | INVEST

ROSTER SIGN-IN SHEET

Meeting Name:		**Date:**	
Position	**Name**	**Dues Submitted**	**Signature**
President		☐ Yes ☐ No	
Vice-President		☐ Yes ☐ No	
Treasurer		☐ Yes ☐ No	
Secretary		☐ Yes ☐ No	
Membership		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
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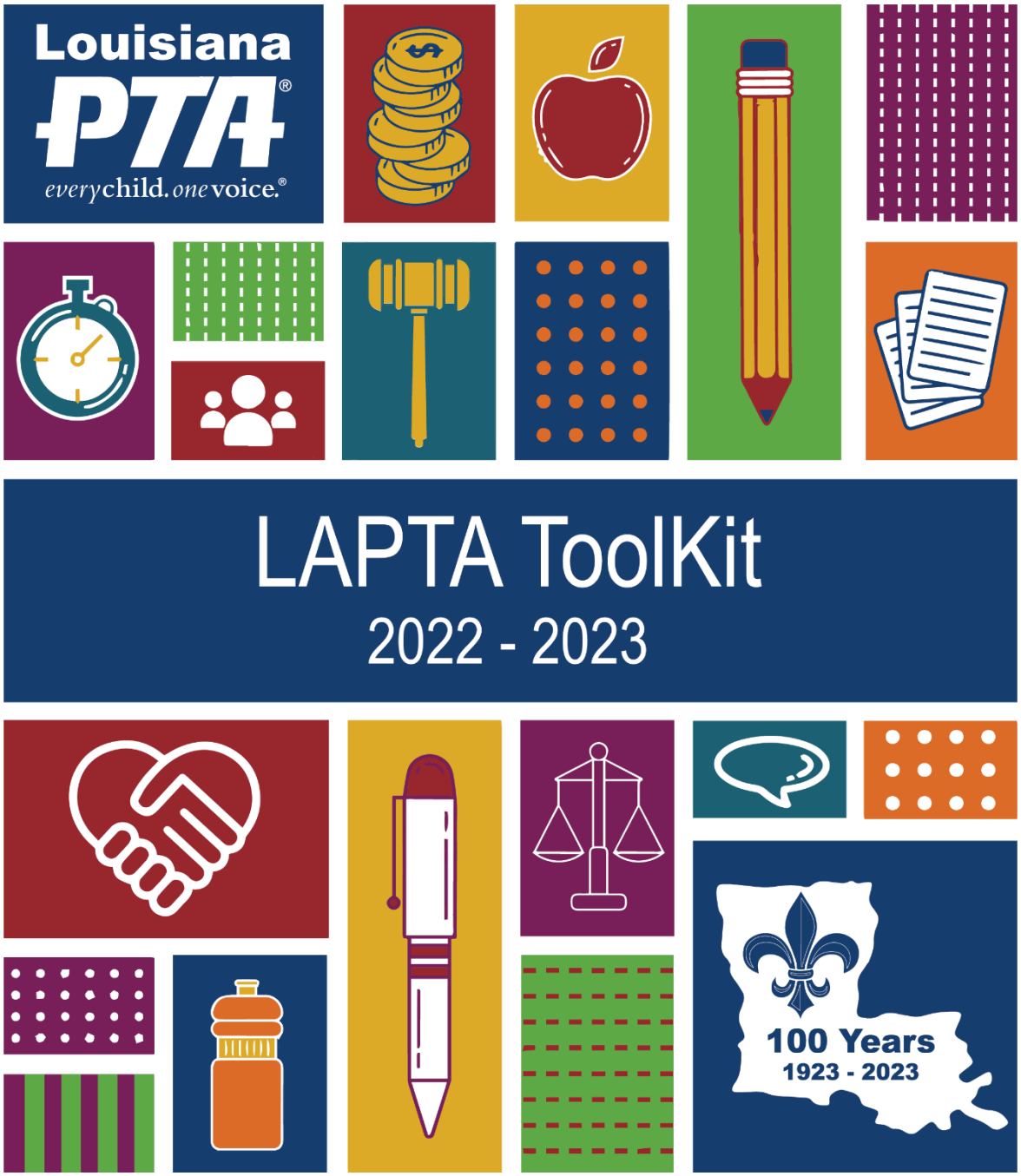


Advocacy

2022 – 2023

Section 7

INDEX

About National PTA 3
Leadership Traits 4
Introduction to Advocacy 4
Gateway to Advocacy: Why Advocate? 5
Advocating on an Issue: Planning 6
Advocacy Strategy Chart 6
Setting Goals 7
Raising Public Awareness 7
Conducting Candidate or Issue Forums 8
Forum Timeline 10
Implementation: Developing Your Message 11
The Voice of Membership 12
Using the Media 13
How to Write a Press Release 14
Sample Thank You Letter to Legislator 14
Advocating with Your School Board 15
Communications and Social Media 16
Application for Local Unit Advocacy Award 18
Application for Student Advocacy Awards 19

Louisiana PTA®

everychild. onevoice.®

100 Years
1923 - 2023

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

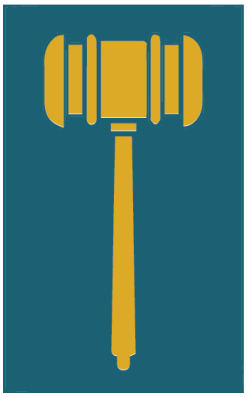
- Standard 1: **Welcoming All Families Into the School Community –** Families actively participate in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively –** Families 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.

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



INTRODUCTION TO ADVOCACY

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

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

The *LAPTA Toolkit: Advocacy* will help guide your PTA to advocate at the local, state, and federal level. Here you will find tools to help you tackle an issue, plan out an advocacy campaign, and implement that plan, along with various tips and tools to help along the way.

GATEWAY TO ADVOCACY: WHY ADVOCATE?

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

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

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

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

Top 5 ways to help your members advocate for kids

1. Each time a parent attends a conference or communicates with the school, they are advocating for their children. Share PTA's Tips for Parent Teacher Conferences in your newsletter, social media, or website.
2. Help educate voters by hosting a Candidates Forum. This forum can be the vehicle to provide information on where school board candidates stand on issues that affect children. Access National PTA's rules and regulations on political activities to ensure your local unit is following non-partisan IRS regulation for nonprofits.
3. Be part of the solution. Encourage your members to become representatives on school committees and attend school board meetings. Work cooperatively with the school administration to educate the community and address the needs of the children within its confines.
4. Be the information conduit. LAPTA disseminates information on hot issues and pending legislation introduced in Baton Rouge. Set up a system which enables you to share this material in a time sensitive manner with your membership through email blasts and Facebook.
5. A thousand is better than one. Promote membership! Every individual member adds to our strong voice for children. As a group we support issues that promote the well-being of children. The greater our numbers, the greater impact we have speaking on behalf of children. In our highly mobile society, there is no way of knowing where our children will venture. Advocating for all children will make everywhere a better place for them to achieve their dreams.

ADVOCATING AN ISSUE: PLANNING

Planning your approach to your advocacy campaign is like mapping directions to a new vacation destination. You need to figure out what a successful campaign will look like, what steps to take to get there, what resources you have or will need, what obstacles and opposition you might run into along the way, and what other groups might be able to help. These things make up your advocacy campaign strategy, or the map of your advocacy campaign.

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

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

ADVOCACY STRATEGY CHART

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

SETTING GOALS

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

- What is the desired result of our advocacy?
- Who are the decision makers to make that happen, and what do we want them to do specifically?
- How will we measure our success? What counts as a victory?
- What steps are there on the way to that success that can be identified and celebrated?

Long-term goals should reflect your overall objectives from your advocacy efforts. **Intermediate goals** should reflect victories that indicate you are on the path to achieving your long-term goals. These goals are important to set because they can help to re-energize your advocacy team and bring in new supporters by showing that you are making progress on your long-term goals. **Short-term goals** should be those steps you need to take to reach your intermediate goals and are often very easily achieved goals. They give your advocacy team some quick wins to generate positive momentum toward your long-term goals and encourage others to get involved.

RAISING PUBLIC AWARENESS

Sometimes your advocacy efforts are focused just on educating your community about an issue. Other times you may need to include an educational component to your advocacy goals because, while you have a specific policy change you want, it is on a topic most people are unaware of. In either instance, your advocacy campaign needs to raise awareness in your community about an issue. Raising public awareness requires a concentrated effort to get your information out in your community in as many ways as possible. Forming coalitions with other organizations that agree with your PTA on the issue can help as well. Here are some ways your PTA can raise public awareness:

- Host a public forum on the issue with local experts, business leaders, local politicians, parents, and students.
- If your school district has a committee focused on the issue, ask that the PTA have a seat on the committee to represent the voice of families in the district.
- Use the public comment period of school board meetings to bring awareness to the issue. Be aware that many school boards limit public comments to two or three minutes, so you may need to spread your information out through several public commenters.
- Provide educational materials as part of voter information. The PTA cannot endorse candidates for any office, but can do non-partisan events like hosting candidate forums, providing voter information on how all the candidates stand on issues, and providing voter scorecards on how incumbents have voted on issues.
- Use public media to build awareness of an issue, including letters to the editor, op-ed pieces, public service announcements (PSAs), local radio call-in shows, TV news public interest pieces, and local community access channels.
- Use social media. Have a memorable hashtag. Develop a selfie-focused campaign with people sharing why they care about the issue (and have them tag their friends).

Candidate or Issue Forum

Candidate or issue forums are a great way to engage your communities in advocacy and to provide information needed to make informed and responsible choices when voting. The following documents are designed to assist your PTA in planning and conducting both types of forums. All sample documents should be edited to fit the needs of your school or district:

CONDUCTING CANDIDATE OR ISSUE FORUMS

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

What Is a Forum? A forum is a public meeting or assembly for open discussion. At a candidate forum, speakers answer questions directly from audience members, panelists, or a moderator, but do not directly engage with each other. Speakers may be on stage simultaneously or at separate times. If your format requires a moderator, you may consider a person that is not associated with a political interest group to provide a neutral and objective position. Organizations such as The League of Women Voters, American Association of University Women, or other community groups familiar with the issues and candidates may be better qualified to ensure the forum is noncommercial, nonsectarian, and nonpartisan. PTA does not participate in candidate nights, forums, or voter awareness programs with organizations that endorse candidates. Forums:

- Inform the public and help voters make informed decisions.
- Provide the public an opportunity to hear the candidates discuss important issues.
- Provide candidates with information that concern their constituents.
- Get candidates on the record so they can be held accountable for their stated positions on issues.
- Provide an opportunity for candidates to get their message out to the voters.
- Provide an important public service.

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

- **School Board Candidate Forum:** Local school board elections are nonpartisan. Your PTA may hold a forum to provide an opportunity for your community to hear from and ask questions of the candidates. You can prepare questions ahead of time for each candidate to answer, and/or allow questions from the audience. You will want to ensure that all candidates have an opportunity to answer each question (time limit on responses). Treat all candidates the same particularly since many school board members have come from the local PTAs. Remember that PTAs support or oppose issues, not candidates!
- **City Representative Candidate Forum:** PTA may hold a candidate forum to discuss the issues important in that community. Follow the same guidelines offered in the school board candidate forum. When hosting a forum on an issue of concern in your community, it may be more effective if it is a joint venture with your homeowner's association or other neighborhood group. Also, many communities are taking their concerns to and sharing information on community social media channels. Become a part of these networks to engage your PTA community. Remember that PTAs support or oppose issues, not candidates!
- **Ballot Issues Forum:** If your PTA wishes to hold a forum on a ballot issue such as a proposition that affects education, you may consider using the following format. To host a forum for a ballot issue, form a panel of approximately five people who are knowledgeable on the subject, preferably some for and some against it, who can answer questions on the ballot issue. Your PTA may want to consider having one person from your school board, one administrator, one community member, and two others to be identified by your PTA. You might want to consider inviting one of your local state legislators to be on the panel, as well. Your PTA might want to skip the gathering of questions ahead of time and go strictly with questions from the audience. If your PTA uses this approach, it is recommended that you have a couple of PTA volunteers to screen the questions from the audience so that the same question is not asked repeatedly. Screeners can also filter out confusing, poorly worded, and inflammatory questions. Each panelist might be given five minutes or less to introduce themselves and speak on the ballot issue allowing the audience to know who they are ahead of time.

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

How to Conduct a Candidate/Issue Forum

1. Review the following Forum Timeline.
2. Form an Interview committee that will:
   a. Compose and send a questionnaire to each of the candidates.
   b. Conduct follow-up, in-person, or phone interviews. You must inform the candidate how you will use the information gathered from the questionnaire or interview. If you simply plan to publish the information to members and/or the public, make that clear. The interview questions and format should be the same for each candidate.
   c. Interviews should be held in a non-threatening environment such as a library, meeting room, or other public building.
   d. Do not conduct your committee meeting in any place that may imply a position other than noncommercial, nonsectarian, or nonpartisan (for example not a place of worship, elected official's office, etc.).
3. Schedule a candidates' night or public forum alone or with other organizations interested in public education. Remember that a candidate cannot be asked to sign a pledge on any issue. PTA does not participate in candidate nights, forums, or voter awareness programs with organizations that endorse candidates.
4. Have a Get Out the Vote, PTA Votes, or mock student/parent election campaign to encourage voters to head to the polls. You may choose to write postcards or send emails. Provide information on when voting takes place, locations of the polls, and hours of voting. You might also offer transportation options to those needing a ride to the polls. Have the phone number for the county election offices so individuals can call for answers to questions you might not be able to answer. PTA can educate and encourage members to vote. However, you cannot ask members to vote for a particular candidate or party.
5. Announce all forums, candidate nights, etc. in the local papers, by placing flyers in the community, and on local radio or TV stations. Search online for a list of local media. If your local PTA or school district has a website, make sure to publish announcements there and include your website address in all publicity.
6. Notify LAPTA about your forum. We can notify many of our other PTAs of your event details so they may attend, observe, learn, or team up with you.

Questions Format to Guide Your Forum

Your written questionnaire might consist of ten to fifteen questions that the candidate will complete and return to you prior to an interview or forum. Five to eight questions could be selected from the written document for the questions to be asked at the forum. You will also want to consider questions that are relevant and pertinent to your school district. As attendees register for the candidate forum, you may hand them an index card on which they may write the question(s) they wish to ask the candidates. A committee of forum planners should go through the questions to weed out duplicates and inappropriate questions. Use the most relevant questions to form the oral interview questions for the forum.

TIMELINE

60-90 Days Before Forum

- Identify date for the forum. Factors to be considered could include whether you want to hold the forum just before early voting starts or just before election day. Try to find out if any other organizations are hosting forums.
- Secure a location to hold the forum and reserve the room or building. Ask whether there will be someone there to open and close the facility such as a custodian. Find out who will be setting up the tables, chairs, podium, and microphones.
- Secure a neutral person to be the moderator for the evening. After that person has agreed, make sure they add the forum date to their calendar. Send the moderator a confirmation letter.

45 Days Before Forum

- Solicit questions from PTA members and community members who have an interest in public education.
- Set up a meeting time to finalize which questions will be asked.
- Send an invitation letter to each candidate containing the format for the forum, candidate biographical information, and a place to check yes or no that he/she will be attending the forum.
- Email a letter to the principal or the venue's point person confirming equipment arrangements.

30 Days Before Forum

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

7 Days Before Forum

- Send reminder email.
- Gather up the following needed items: stopwatch, yellow and red banners, bottles of water for candidates and moderator, index cards and pencils, and name place cards for each candidate and the moderator.

Day of the Forum

- Send reminder email.
- Get room or facility ready, including making sure microphones are working properly.
- Provide bottled waters for candidates.
- Arrive an hour before the forum is scheduled to ensure that the facility and equipment are appropriately placed. Lay out name place cards, bottles of water, index cards, and pencils.

After Forum

- Help clean up the room. Thank the custodian.
- Send thank-you letters to the moderator, the candidates who participated, the principal or venue contact, and the custodian.
- Send a thank-you letter to all volunteers who assisted.

IMPLEMENTATION: DEVELOPING YOUR MESSAGE

The core of your advocacy campaign is *communication* with your PTA members, potential supporters, and your targets. Each audience needs a message tailored to their situation. Therefore, it is critical to take care in crafting your message.

Creating a Message Box

Once you researched your issue and laid out your campaign strategy, it is time to start crafting your message. A good first step is to create a "message box" that will help you prepare not only for what your PTA needs to say, but also how to respond to what your opposition may say. In creating the message box, you will need to fill in these four quadrants:

What PTA Says About the Issue	What Opposition Says About the Issue
What PTA Says About Opponent's Position	What Opposition Says About PTA's Position

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

Creating a Message

In crafting your message, you may find it easiest to start with a long argument supporting your position or a list of talking points and then cutting it down to a focused message, an elevator pitch, and a hashtag. As you create your message, remember the Five Cs of Messaging:

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

Framing Your Message

Framing your message simply means focusing on the problem in a specific way to highlight the need for change. When you think about framing your message, consider what stories you can tell about the issue you are advocating. What stories highlight the problem? What stories illustrate a way to your solution? What stories will make your targets care about the issue? With PTA advocacy, we often have the advantage of focusing on issues that involve children, and most people inherently want to help children. Think about how you can focus your advocacy message on how the issue affects a single child and how you can tell that child's story.

Different Types of Messages

Throughout your advocacy campaign, you are likely to need a variety of messages. While the message may be tailored to a specific audience, be sure to keep your advocacy goals front and center in every message. The types of messages you might need include:

- To encourage your PTA members to act
- To raise awareness of and educate people about the issue
- To decision makers to take the action you want
- To encourage counter opposition to your advocacy
- To share your successes along the way towards your long-term goal to encourage more people to join your advocacy

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

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

Proposing New Resolutions or Legislative Positions
Local PTAs or LAPTA may submit resolutions or legislative positions. LAPTA considers all submissions, biannually, upon the recommendation of the Advocacy Committee. Submissions must be received at the LAPTA Office no later than November 15th in odd-numbered years.

Criteria for Consideration
- Further the mission of the PTA.
- Align with National PTA and LAPTA policies and are noncommercial, nonpartisan, nonsectarian.
- Concern a matter of national or state scope, not merely local interest.
- Request action that is feasible for LAPTA to undertake.
- Adopted by the membership of the submitting PTA.
- State a position not previously adopted by the LAPTA.

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

Emergency Resolutions or Legislative Positions
PTAs wishing to propose an emergency item must submit the proposal to the LAPTA no later June 15 in even-numbered years. To be eligible for emergency consideration, the issue must have arisen after the published November 15 submission deadline. If approved by the LAPTA Board of Directors, a two-thirds affirmative vote of the delegate body is necessary to consider the emergency item.

USING THE MEDIA

Whether you are campaigning to raise awareness of an issue, educate your community about an issue, or advocate for change, media provides the best opportunity to get your message in front of the most people. Consequently, you will want to include a media plan in your advocacy campaign.

Using Different Types of Media

Each media platform has its advantages and disadvantages. You will want to spread your media efforts across as many platforms as possible, since they often reach different audiences.

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

Activities that Generate Media Interest

Media coverage can be a long-term effort. Learn who covers education issues at the local paper, radio station, or TV station. Follow them on social media and see what type of stories they are covering. That tells you not only what they are reporting on but also what types of stories their editors are printing or airing. When pitching stories, be sure to emphasize the local angle and the importance of the issue to your community. Think about the potential visual aspects of the story, as even getting just a picture and caption in the newspaper can help with your advocacy campaign. Inform the media of the event several days in advance through a press release. Here are some activities that may generate media interest:

- School board or other candidate forums
- PTA events that involve kids doing something related to your campaign
- Press conference (if you have actual news), ideally in front of an example of what you are advocating about. The best time for press conferences is Tuesday through Thursday between 10 am and 2 pm, which allows reporters to get their story ready for evening news programs.
- Picketing with educational handouts

HOW TO WRITE A PRESS RELEASE

Use a press release if you are contacting multiple media outlets. There is a specific format for a press release, and you can use numerous online examples for formatting guidance. You can also look at National PTA's online press releases, which are good examples of content, but not necessarily laid out like a traditional press release. At the top left of the page, put the name and contact information for the person reporters should reach out to for further information. At the top right of the page, put "FOR IMMEDIATE RELEASE" (typically in all caps and bold). Below the contact information, place a headline that quickly summarizes what the press release is about, centered on the page in bold. Make sure your headline stands out by using action verbs, specific, and keeping it short. If you need to, you can add a subheading in italics below the headline. Keep in mind that newsrooms get dozens or hundreds of press releases every day, so make sure your headline is compelling.

Because newsrooms get so many press releases, you need to make sure the most important information is right at the top. The first paragraph should cover who, what, and where. The second paragraph should cover the why. These two paragraphs should cover all crucial information. Beyond the first two paragraphs, you can add a quote from your PTA president or a PTA family, share non-critical information, and provide a summary of what your PTA is. Try to keep your press release to a single page. At the end of your press release, centered on the page, put "###" or "-30-" to signify the end of the release.

SAMPLE THANK YOU LETTER TO A LEGISLATOR

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

Dear [Senator/Representative] [Last Name],

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

Sincerely,
Signature
[PTA Name, Position]

ADVOCATING WITH YOUR SCHOOL BOARD

Just starting on your advocacy journey? It is common to feel nervous as you start this process, and your local school board is a common place to start. Local PTAs want school board members to know their PTA leaders and members as a useful and knowledgeable resource when it comes to matters that concern students and their schools. Developing this relationship is done in a variety of ways, not the least of which is a regular attendance at school board meetings and developing an understanding of the role of an elected school board member. Virtual school board meetings make it easier to become familiar with how your school board works and to stay aware of the issues they are dealing with. When you need to advocate with your school board, here are some things to keep in mind:

- Public comments might only be allowed during a public comment period at the beginning of the meeting, not while an agenda item is being discussed. Be aware of how your school board handles public comments.
- Public comments are limited by time, so know how long your school board allows. Two or three minutes is common.
- Board members listen, but generally do not respond to public comments when they are made. They may ask a question to clarify the comment.
- If you are meeting with school board members to discuss your issue, it is probably best to do it one on one.

Using the School Board Public Comment Period Effectively

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

- **Prepare/Research**: Review your Local PTA Unit meeting minutes and your school board meeting minutes and website for information pertinent to your planned comments. Check the source of information that you have with information from your school district. School board policy requires transparency of information and reports and is an excellent resource for financial, academic, operations, human resources, communications, and school board information. Check your district's public participation policy to know which part of the meeting agenda the public may speak during. It may be once or twice during the meeting and may have an "agenda item-only requirement" for one of the two public comment options.
- **Organize your thoughts**: Outline your key points and start by explaining to the board members what you are there to speak about. Knowing exactly what you are there to praise/thank, ask for clarification, or share your disagreement about allows your listeners to focus on your entire message. Be honest about your level of comfort speaking publicly. Unless you are completely comfortable speaking "off the cuff" you should write your statement out and read it directly during the comment time. Having it printed out to make any last-minute changes is easiest to do. If you use a tablet, iPad, or smartphone be sure to have it easily accessible. It is easy to lose your place when scrolling through the document so consider saving it as a PDF on your phone or tablet. Use a large font to make it easier to read.
- **Practice**: Be sure to say your name to introduce yourself and the school with which you are associated. Read your public comment aloud to hear it for yourself and to practice speaking slowly and emphasizing aspects of your message to match what you want them to truly hear. Do not raise your voice, use sarcasm, be dismissive of their role, denigrate members of the administration, or speak negatively about your school's principal, administrators, faculty, or staff. If you have a problem related to a staff member, that issue should be raised in private with the principal of the school, with the assistant superintendent for that area, or the superintendent once all avenues have been tried. Watch your time, and if you have only one or two sentences remaining, let the board president know to allow you to finish.

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

APPLICATION FOR LOCAL UNIT ADVOCACY AWARDS

Application Deadline: February 1, 2023
Apply at: https://form.jotform.com/221794928286067

Winners Announced: March 25, 2023
Quantity Offered: 2

Local PTAs can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation substantiating the completed advocacy work. **Application deadline is February 1.** Winners are announced on March 25 at the Centennial Celebration in Baton Rouge.

Local PTA Name _____ LUR _____ Parish _____

Your Name _____ Email _____

PTA Position or Role _____ Phone _____

PTA Website _____ PTA Facebook Page _____ PTA Twitter _____ PTA Instagram _____

Award eligibility for LOCAL PTA Units for Outstanding Advocates for Children (OAC) must have completed at least four *Building Awareness Activities*, and at least six *Civic Engagement Activities*. Eligibility for Be the Voice (BTV) must have completed at least three *Building Awareness Activities*, and at least four *Civic Engagement Activities*.

Application for: ❒ Outstanding Advocates for Children (OAC) ❒ Be the Voice (BTV)

Complete the following steps.

1. Select the completed **Building Awareness Activities.** ***Attach documentation for each item.***
   - ❒ Educate and communicate LAPTA legislative issues through social media, newsletters, programs, and other avenues to PTA members and the community at large.
   - ❒ Share advocacy updates and information from LAPTA and how to sign up for the LAPTA newsletter.
   - ❒ Share LAPTA advocacy alerts to membership.
   - ❒ Host programs or family events. Pick a legislative priority topic and build a community event around that issue. For example, invite guest speaker, discuss topics, and have a related activity.
   - ❒ Collaborate with other local PTAs.
   - ❒ If appropriate, seek community partners and other association relationships to elevate your work.
   - ❒ Other

2. Select the completed **Civic Engagement Activities.** ***Attach documentation for each item.***
   - ❒ Write letters or postcards to share your concerns or support regarding LAPTA legislative issues.
   - ❒ Make phone calls to elected officials in response to LAPTA Legislative Alerts.
   - ❒ Meet with legislator or legislative staffer to discuss LAPTA legislative priorities. Collaboration with other local PTAs is encouraged.
   - ❒ Give legislators school tours to meet students, parents, counselors, teachers, and administrative staff. Discuss how PTA legislative issues impact your campus and community.
   - ❒ Attend an event at the Louisiana State Capital.
   - ❒ Attend other forums pertaining to public education, child health, and child safety that align with PTA's goals.
   - ❒ Other community engagement

3. Attach further information or documentation that strengthens your application.

Submit application online at https://form.jotform.com/221794928286067 or scan the QR Code **by February 1, 2023. Winners will be announced on March 25, 2023.**

APPLICATION FOR STUDENT ADVOCACY AWARD

Application Deadline: February 1, 2023
Apply at: https://form.jotform.com/221794914529163

Winners Announced: March 25, 2023
Quantity Offered: 2

LAPTA accepts applications for our Student Advocacy Award program to recognize students who help to truly enhance public education. Students who are involved with civic engagement at an early age are the pillars of Louisiana's future! Students can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation substantiating the completed advocacy work online. **Application deadline Is February 1, 2023**. Winners will be announced March 25, 2023.

Student Name	Local PTA at the Student's School
School Name	Parish
Parent Name	Parent Email

Award eligibility for students for Outstanding Advocates for Children (OAC) must have completed at least two *Civic Engagement Activities*. Eligibility for Be the Voice (BTV) must have completed at least one *Civic Engagement Activities*.

Application for: ❒ Outstanding Advocates for Children (OAC) ❒ Be the Voice (BTV)

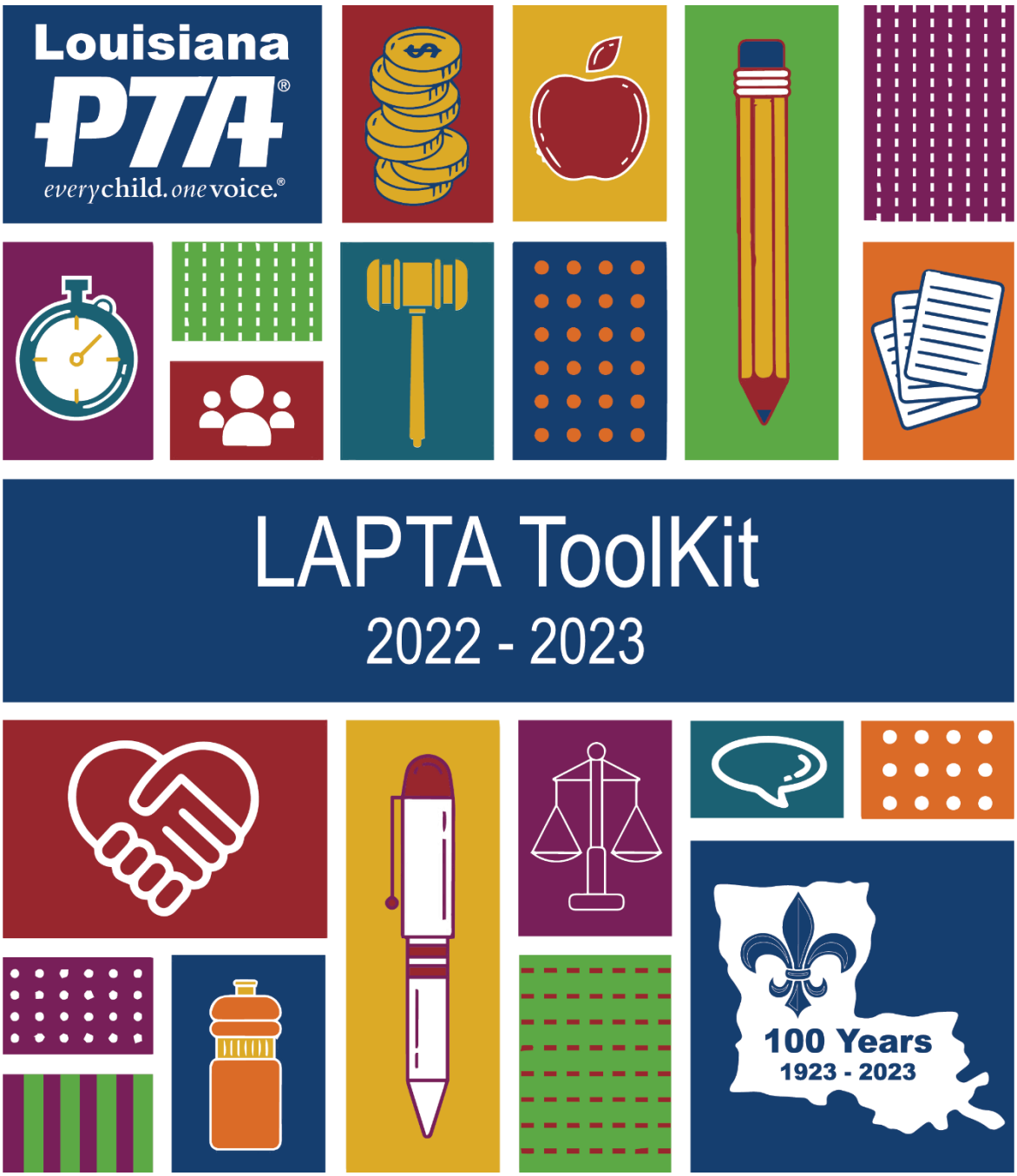
Complete the following steps.

1. Select the completed **Civic Engagement Activities.** ***Attach documentation for each item.***
   - ❒ Sponsored voter registration drive.
   - ❒ Hosted voter education program.
   - ❒ Hosted a program or campaign about a LAPTA legislative priority issue.
   - ❒ Met with legislators representing student's school community.
   - ❒ Created an online candidate questionnaire regarding PTA legislative priorities.
   - ❒ Other community engagement.

2. Attach further information or documentation that strengthens the application.

Submit application online at https://form.jotform.com/221794914529163 or scan the QR Code **by February 1, 2023. Winners will be announced on March 25, 2023.**

Louisiana PTA
1923
2023
100 Years
Here We Geaux!



Diversity, Equity, and Inclusion
2022 – 2023
Section 8

INDEX

About National PTA 3
Leadership Traits 4
Introduction 4
Promote Diversity in Your School 5
Hold an Inclusive PTA Meeting 6
Organize an Inclusive PTA Event 7
Icebreakers 8
DEI Resources 9
Communications and Social Media 10

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

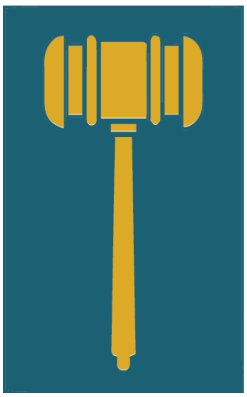
- Standard 1: **Welcoming All Families Into the School Community –** Families actively participate in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively –** Families 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.

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



INTRODUCTION TO DIVERSITY, EQUITY, AND INCLUSION

PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child. Diversity, equity, and inclusion supports every child with one voice, no matter their race, ethnicity, zip code, income, gender identity, sexual orientation, immigration status, or abilities. LAPTA recognizes that advancing diversity, equity, and inclusion is an integral part of PTA's work and its vision of making every child's potential a reality. *LAPTA Toolkit: Diversity, Equity, and Inclusion* is a resource for PTA leaders to develop and advance their own diversity, equity, and inclusion plans and programs in their school and community.

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

Equity is the fair and impartial treatment, access, opportunity, and advancement for all individuals considering systemic inequalities and outcome disparities within society.

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

To best serve all students, PTA leaders should become familiar with their school and community demographics. This provides useful student and school data such as total number of students, enrollment data by gender, ethnicity, disabilities, economic disadvantage, English language learners, migrants, homeless, and foster care. To access additional specific data, request information from the school or district administration.

PROMOTE DIVERSITY IN YOUR SCHOOL

As a powerful voice for ALL children, a relevant resource for families and communities, and a strong advocate for the education and well-being of EVERY child, PTAs are well-equipped to foster the principles of diversity, equity, and inclusion in their schools and community. Our diversity is our strength! PTA volunteers who are "intentional" in their DEI efforts are most likely to experience great outcomes that benefit all children and their families rather than just isolated patches of success.

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

Form a DEI Committee in your unit with clearly defined charges and goals that are periodically reviewed and updated. PTA needs to seek a diverse membership that reflects the diversity of the student body and community it serves through "targeted outreach" efforts. Consider which groups are less likely to join your PTA or participate in meetings and events. To achieve successful outreach, we need to educate ourselves regarding cultures, traditions, challenges, and restrictions of groups we aim to reach.

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

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

Assure that all PTA meetings and events reflect a welcoming and inclusive environment for all. Most importantly, if leaders are reminded of PTA's mission, vision, and core values as the focus and purpose of all PTA work, they are on the right path to applying the principles of diversity, equity, and inclusion in their service to school, community, and to EVERY child with ONE voice. Refer to *How to Hold an Inclusive PTA Meeting* and *How to Organize an Inclusive PTA Event* later in this section.

HOLD AN INCLUSIVE PTA MEETING

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

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

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

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

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

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

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

ORGANIZE AN INCLUSIVE PTA EVENT

Advertise PTA events through all possible electronic methods, social media, print, mail, and school backpack. Assure event fliers and invitations are translated into all languages spoken in your school community. Avoid communication and participation barriers ensuring all attendees can participate no matter what their spoken language and physical or mental abilities are. Provide clear and transparent explanations of all PTA events and activities, especially to first timers not familiar with the activities, past traditions, and customs of the PTA. The better informed and prepared everyone is, the more comfortable they will feel and more likely to return.

Anticipate potential need for anything participants might need to attend and take part in the event such as transportation, directions, time commitment, special accommodations, material, or electronic devices. Support remote platforms providing virtual options such as Zoom and Google Meets when possible. They present great opportunities for families with time restraints and travel or accessibility challenges.

Consider holding certain events at locations other than the school building, taking the event to the people you seek to engage. Alternate locations so everyone can feel important and embraced. Provide calm or quiet spaces if your event has the potential to be loud or filled with excitement. Sensory overload affects many people, young and old. Make sure to advertise that these spaces are available on your communication materials. You can also consider holding “Sensory Friendly” events, like a Bedtime Book Reading family engagement activity or a board game night, or by limiting the number of families who can attend an event at a time and simply offer more of those events. Utilize icebreakers (see *Icebreakers* later in this section) at the start of events as they present a great tool to put everyone at ease.

Consider inclusive, culturally sensitive, and diverse topics and speakers and invite others to make suggestions for topics they would like to see addressed. Food, beverages, giveaways, and prizes can be utilized as attractive incentives for participation. Families with children are more likely to attend and stay through events that feature fun and engaging activities for children of different ages and abilities.

Your PTA’s DEI Committee can plan a school or district-wide DEI event that promotes diversity and inclusivity through themes, messages, and activities. Celebrate our differences! Promote and organize events where all groups can educate others, share information, promote, and advocate for themselves. Connect and collaborate with community-based organizations that share a focus on diversity and inclusion. Engage in active and two-sided dialogue, allowing for opportunities for all stakeholders to express their opinions and needs and those organizing the event, not only speaking, but actively listening and following up.

In addition to families, be sure to invite teachers, school and district administrators, staff, and community partners to PTA events. Building strong connections with all groups assures good relations and positive outcomes for children and families. Organize events that develop positive relationships between teachers and families to help overcome cultural barriers that interfere with active family engagement in children’s education and schools. Plan PTA events that help level the parent/family education field and close the information gap that may hinder family involvement in their child’s education. Events may include family math or science nights, technology, child development topics, and college or career prep and funding, to name a few.

ICEBREAKERS

An easy way to promote inclusion at PTA meetings is to encourage members to interact with each other. Including an icebreaker at your PTA meeting is 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 folks 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 folks mingle and step out of their zone of comfort. 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. Ask participants to take turns reading the above statement after filling in the blanks with pertinent information about themselves.

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. Instead, participants guess whose interesting fact is being read aloud, creating a more fun and playful dynamic. 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.

DEI RESOURCES

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

PTA Commitment to DEI:
PTA.org/docs/default-source/default-document-library/dei-brief-final-072720.pdf

Local Leader DEI Guidance:
PTA.org/docs/default-source/files/runyourpta/2020/diversity/dei-guide-for-pta-local-leaders.pdf

How to Welcome Diverse Perspectives Into Your PTA:
PTA.org/docs/default-source/default-document-library/diversity-outreach-2-pager_v3.pdf

DEI Initiatives: Frequently Asked Questions:
PTA.org/home/run-your-pta/Diversity-Equity-Inclusion/leadership-tips-and-tools/Diversity-and-Inclusion-Initiatives-Frequently-Asked-Questions

DEI Community Profile Template:
PTA.org/docs/default-source/default-document-library/dei-community-profile-template-final.pdf

Enhancing DEI Facilitator's Guide:
PTA.org/docs/default-source/default-document-library/enhancing-dei-facilitator's-guide-final.pdf

DEI Action Plan Template:
PTA.org/docs/default-source/default-document-library/dei-action-plan-template-final.pdf

Inclusive Holiday Planning:
PTA.org/docs/default-source/files/runyourpta/diversity/inclusive-holiday-programming.pdf

Inclusive Communication During the Holidays:
PTA.org/docs/default-source/files/runyourpta/diversity/inclusive-communication-during-the-holidays.pdf

Inclusive Curriculum in K-12 Schools:
PTA.org/docs/default-source/files/advocacy/position-statements/inclusive-curriculum-in-k-12-schools-ps.pdf

LGBTQ Glossary:
PTA.org/docs/default-source/files/runyourpta/2020/diversity/lgbtq-glossary.pdf

How to Talk About Race and Justice in America:
PTA.org/docs/default-source/default-document-library/how-to-talk-about-race-justice-in-americaaa2a48f1aa3e63899f67ff00009b2bd9.pdf

COMMUNICATIONS AND SOCIAL MEDIA

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.

COMMUNICATIONS OVERVIEW

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.

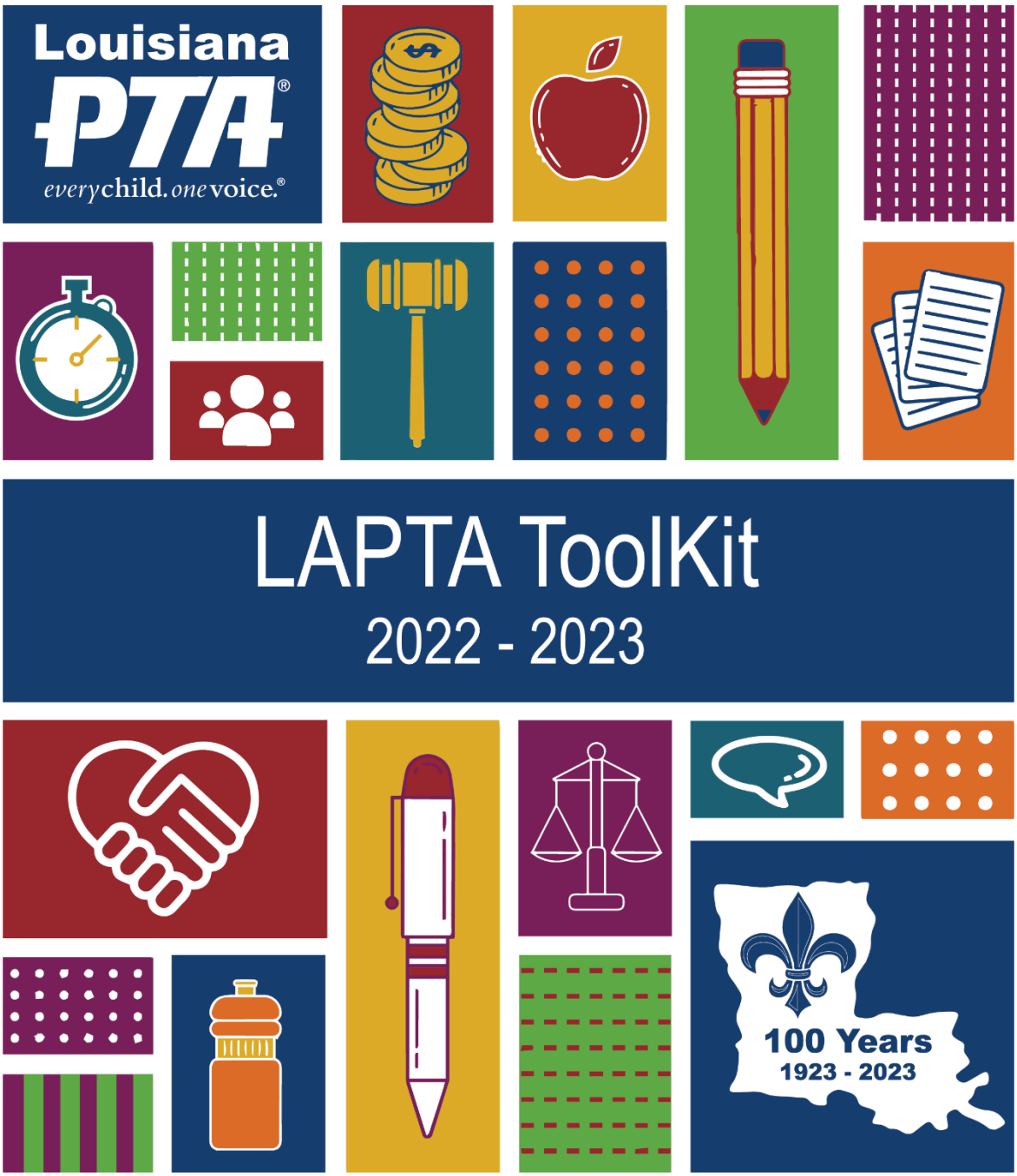
Ensure Quality Communication

- 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.

Louisiana PTA
1923
2023
100 Years
Here We Geaux!



Elections & Nominating Committee 2022 – 2023 Section 9

INDEX

Nominating Committee 3
Elections 4
Script for Non-Contested Elections 5
Script for Contested Elections 6
Nominating Committee Report 7
Teller Committee Report 8
Confidentiality, Ethics, and Conflict of Interest Policy 9

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100 Years
1923 - 2023

NOMINATING COMMITTEE

A PTA is as effective as its leadership. The Nominating Committee is a special committee that holds the key to a successful PTA. The committee is responsible for presenting the best qualified nominees for office. A successful election is important to a smooth transition for a PTA from year to year. All members are invited and encouraged to get involved in this important process. Nominating Committees are elected by the membership, never "formed" or appointed.

Any member who has paid current year's dues to the unit is eligible to be on the Nominating Committee. The current PTA President **may not** serve on the committee. All members should have an opportunity to nominate or be nominated for the committee. The principal shall not serve on the Nominating Committee. If not elected to the committee, others may serve in an advisory capacity. Members of the committee should be fair, ethical, and impartial when evaluating people, have tact, discretion, and integrity, and keep all deliberations confidential.

The committee is elected by the General Membership, as described in Article X, Section 5 of the LAPTA Local Unit Bylaws Template, May 2022 revision, which also states the number of people to be elected. It is always an uneven number. The Secretary should read those portions of the Bylaws pertaining to the nomination and election of officers to the entire membership before the election of the committee. Elect the committee at least one month prior to the election meeting.

The Nominating Committee shall meet immediately after the committee members are elected to elect the Committee Chair. Schedule the date, time, and location for the committee meeting(s). The committee should have the Bylaws, Standing Rules, board list, a membership roster, and job descriptions. Matters discussed by the committee are strictly confidential. Committee meetings are open to committee members only. Discussions must be open and honest. No information should leave the committee meeting, even after the officers have been elected. If a member of the committee is running for an office, they may not be a part of the discussion of the office for which they are running. The committee shall review all sections of the Bylaws relating to the duties of the Nominating Committee including the month of the election meeting.

When selecting nominees, the committee shall review all sections of the Bylaws and Standing Rules relating to officer duties. They shall solicit suggestions for nominees from the membership, current Board members, and staff. Consideration candidate qualifications and choosing the best person for each position are vital. Individuals currently serving in a position are not automatically allowed to repeat in that position.

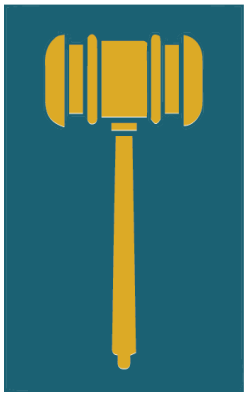
The committee may contact prospective candidates during the committee meeting to explain the duties. Prospective candidates for officer positions should be somewhat knowledgeable about PTA, willing to attend training, enthusiastic for the PTA vision, mission, and purposes, and willing to commit the time necessary for the position. Allow time for a candidate to consider the position before asking for their decision. Treat all candidates in a fair and consistent manner. Ifthe committee cannot secure a nominee for a position, it remains "open," and the President calls for nominations for that position from the floor at the election meeting.

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

The committee shall present the report to the Board for information only. The Committee Chair may present the report to the current PTA President as a courtesy, prior to presentation to the Board. Publish the Nominating Committee Report at least seven days before the election meeting. Present the report at the election meeting which is usually read by the Committee Chair. The Nominating Committee is dissolved once the report is read. The report is passed to the President, who opens the floor for nominations and conducts the elections. Only a member who has not signed the report can nominate from the floor.

ELECTIONS

Before the election's General Membership meeting, review Article VI, Section 4, and Article XI, Section 4, of the Bylaws (May 2022 rev.), which describe when and how the unit elects. Publicize the slate of officers at least twenty days before the election meeting. After the Nominating Committee presents its report to the General Membership, the presiding officer conducts the election even if they are a nominee. The presiding officer presents each nominee individually and calls for additional nominations from the floor. Nominations do not require a second, only the nominee's consent.



Non-Contested Election

If there are no additional nominees, it is a non-contested election, and the vote may be by voice. However, if a member requests a vote by ballot for any office, the request must be recognized and voted upon by the membership without debate.

Contested Elections

If there are additional nominees, they should be introduced and all candidates for contested office are given two minutes to speak. This is considered a contested election and the vote must be by ballot. Have paper on hand to distribute. It is permissible to use both voice and ballot voting for one election where offices with only one candidate use a voice vote and offices with more than one candidate use ballot vote.

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

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

If no candidate receives a majority of the votes cast for the office, there is no election, and it will be necessary to re-ballot. If this is necessary, the voting members must be recounted. If a member eligible to vote was not present when the original ballot was cast but arrives in time for another vote, the member is entitled to vote. Following the announcement of the vote, the chair of the tellers moves that the ballots be destroyed.

Assuming Office

Those elected assume office as specified in the Bylaws. An officer serves until a successor is elected. If a vacancy occurs after the election, the vacancy is filled after the newly elected officers assume office, according to the method of filling vacancies prescribed in the Bylaws under Article VI, Section 7 (May 2022 rev.).

SCRIPT FOR NON-CONTESTED ELECTION

President: "The next order of business is the election of officers. The Secretary will read Sections 4 and 5 of Article VI of the Bylaws pertaining to elections."

Secretary: Stands and reads the Bylaws section.

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

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

President:
"For President, [name] has been nominated by the Nominating Committee. Are there further nominations for President from the floor? (*pause*) Hearing none, nominations are closed.
For Vice-President, [name] has been nominated by the Nominating Committee. Are there further nominations for Vice-President from the floor? (*pause*) Hearing none, nominations are closed."
For Treasurer, [name] has been nominated by the Nominating Committee. Are there further nominations for Treasurer from the floor? (*pause*) Hearing none, nominations are closed."
For Secretary, [name] has been nominated by the Nominating Committee. Are there further nominations for Secretary from the floor? (*pause*) Hearing none, nominations are closed."

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

SCRIPT FOR CONTESTED ELECTION

President: "The next order of business is the election of officers. The Secretary will read Sections 4 and 5 of Article VI of the Bylaws pertaining to elections."

Secretary: Stands and reads the Bylaws section.

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

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

President: "For President, [name] has been nominated by the Nominating Committee. Are there further nominations for President from the floor? (*pause*)

Member: "Mr./Madam President, I nominate [new name] for President."

President: "[New name] has been nominated for President. Are there further nominations for President? (*pause*) Hearing none, nominations are closed."

The president continues this procedure for each office.

President: "As President, I appoint [four people] as tellers for the Teller Committee. Will [specific Teller's name] serve as chair?" (*pause)*

"The voting members will rise and count off. A teller will hand you a ballot as you count off. Please take your seat immediately after saying your number and receiving your ballot. Beginning with the member in the front row to my far left, please say 'one' and then be seated."

"There are [number] voting members present. The candidates for President are [name 1] and [name 2]. Using the ballot provided, write your choice for election, and then individually fold your ballot once." (*Allow two or three minutes for voting*.)

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

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

President: "The tellers are ready to report."

Teller Committee Chair: "The Teller Committee reports:

Number of members eligible to vote is _____.
Number of votes cast is _____.
Number of illegal votes cast is _____.
The number of votes needed for election is _____.
(Candidate Name) _____ received (#)_____ votes.
(Candidate Name) _____ received (#)_____ votes.

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

NOMINATING COMMITTEE REPORT

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

For President: _____

For Co-President: _____

For Vice-President: _____

For Second Vice-President: _____

For Treasurer: _____

For Secretary: _____

For [Other]: _____

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

Members of the Nominating Committee:

Name	Signature	Date
Name	Signature	Date
Name	Signature	Date
Name	Signature	Date

Nominating Committee members sign the report if they agree with the nominations. Members not in agreement with the recommended slate of officers may not make nominations from the floor.

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

TELLER COMMITTEE REPORT

Name of PTA/PTSA: _____

For the Office of _____

_____ Number of members eligible to vote

_____ Number of votes cast

_____ Number of illegal votes cast

_____ Number of votes needed for election

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

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

Members of the Teller Committee:

_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date

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

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

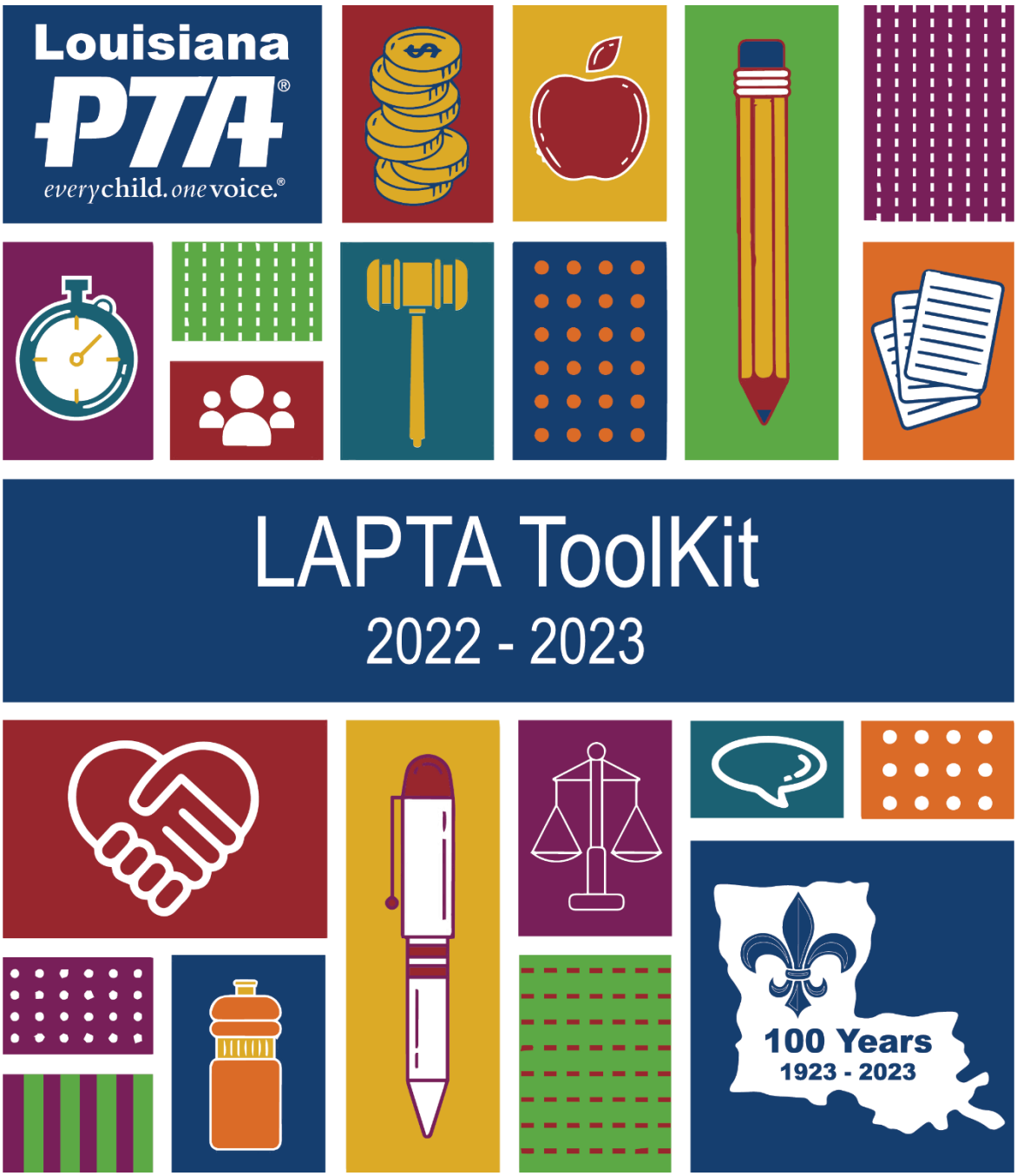
Members of the Board of Directors of the PTA/PTSA serve in a **fiduciary capacity** and owe a **duty of care**, a **duty of obedience**, and a **duty of loyalty** to the PTA. Board members shall conduct themselves with **integrity** and **honesty** and act in the **best interests** of the PTA. Disclosure 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.

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

Date	Board Member Name	Position	Signature



Bylaws, Standing Rules, & Articles of Incorporation 2022 – 2023 Section 10

INDEX

Bylaws and Amendments: Updating and Approval 3
Bylaws and Amendments Approval Form 4
Instructions for Bylaws Template 5
Standing Rules 7
Articles of Incorporation 8

BYLAWS AND AMENDMENTS: UPDATING AND APPROVAL

Bylaws are the fundamental governing rules of a PTA. They contain the basic rules related to conducting the unit's business and governing its affairs. The Bylaws define the primary characteristics of the organization, prescribe how the association functions, and include all rules considered important to the rights and responsibilities of membership.

The Bylaws are a template created by LAPTA that includes required language which cannot be changed by the local PTA. The customizable areas are changeable by the local PTA to best meet their needs. Download the Bylaws template at LouisianaPTA.org/bylaws. Amendments to the customizable areas may occur at any time, and require approval by the General Membership at a meeting with thirty days (30) notice and then final approval by LAPTA.

LAPTA requires all local units to submit updated Bylaws **every three years**. All Bylaws have an "LAPTA Approval Date" on page one. The Board needs to know when the Bylaws expire and make a plan to update the Bylaws in a timely manner. To update or amend the Bylaws:

1. Form a Bylaws Committee of at least three members which must be approved by the General Membership. The committee shall include experienced and knowledgeable PTA members. The local unit President should have a copy of the current approved Bylaws or request a copy from LAPTA at Bylaws@LouisianaPTA.org.
2. Notify the General Membership in writing at least 30 days prior to the meeting as which the vote will occur to amend or update the Bylaws.
3. Obtain the official fill-in-the-blank LAPTA Bylaws template online at LouisianaPTA.org under the *Run Your PTA* menu or email Bylaws@LouisianaPTA.org, if Bylaws need updating.
4. Provide the Bylaws Committee with the old Bylaws for reference. Consider recommendations submitted by the Board of Directors and General Membership. For proposed amendments, all changes must meet the needs of the unit, have clear intent, and not conflict with the Louisiana and National PTA Bylaws. Amendments need to reference their article heading, section number, and line number(s) in the Bylaws.
5. Present the General Membership with the proposed Bylaws or amendments before the vote on the proposed Bylaws or amendments. Approval requires a two-thirds vote of the members present.
6. Complete the Bylaws and Amendments Approval Form found at the end of this section or at LouisianaPTA.org under *Run Your PTA* menu, Bylaws link. Attached the approved and complete Bylaws (not just the updated portion). Submit to Bylaws@LouisianaPTA.org. If an amendment does not fit in the space on the form, check the box for an attached addendum.

LAPTA reviews all Bylaws and amendments. If there are questions, LAPTA will contact the President. Once approved, they will be stamped "APPROVED," signed, and dated. **The stamped, signed, and dated copy is the official copy of the Bylaws.** The Bylaws and amendments become effective once LAPTA emails back the final approval to the President's email. Save the digital file in the PTA records and share with the Board.

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit **LouisianaPTA.org/bylaws** for details. Bylaws not in compliance will be returned to local unit. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments made in PDF format to **Bylaws@LouisianaPTA.org**. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President's email.

Local Unit Name _____ Local Unit Parish _____ Local Unit LUR# _____

President's Email _____ President's Phone _____

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

Choose one.
The Local Unit PTA is: ☐ Existing PTA ☐ Reinstated PTA ☐ New PTA

Choose all that apply.
☐ The Bylaws approved by the General Membership are attached.

☐ List approved amendments below including the article heading, section number, and line number(s).

_____

_____

_____

_____

☐ If more space is needed for amendments, check here for the attached addendum.

President's Signature _____ Secretary's Signature _____

President's Name _____ Secretary's Name _____

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to **Bylaws@LouisianaPTA.org** in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final approved document to the President's email.

Contact Bylaws@LouisianaPTA.org with any questions.

INSTRUCTIONS FOR BYLAWS TEMPLATE

The official Louisiana PTA fill-in-the-blank Bylaws simplify the amendment process and expedite approval. Articles or sections without bolded text are required and cannot be altered in any way; therefore, they must be included exactly as written. Changes can only be made to sections of the Bylaws that have "**bolded**" areas. Additional changes to these sections should be listed in an addendum.

Page 1: PTA Unit Information
Line 2: PTA Unit's Name
Line 4: Local unit registration number (LUR#)
Line 5: Federal Employer Identification Number (EIN) *If your unit is new or reaffiliating and does not have a LUR# or EIN but has applied for them, email the information to bylaws@LouisianaPTA.org upon receipt.*
Line 7: School that your PTA/PTSA supports
Lines 9 -11: School address
Line 13: Parish that your PTA Unit is in

Page 2: **Article I: Name**
Line 35: PTA Unit name and city

Page 6: Article V: Membership and Dues
Line 214: Fill in the dues amount each member will submit to the local PTA/PTSA. If your unit offers a family, student, or corporate/business membership, include the dues for each member and the number of members allowed for each designation. For example, $8 for a single, $5/student, $15/couple (2 members), $50/corporate (5 memberships). *Remember that your PTA must submit dues of $3.50 for each member in your unit to LAPTA.*

Page 6: Article VI: Officers and Their Election
Line 228: Fill in the number of vice-president(s)
Line 229: Fill in the number of secretary(ies)
Line 231: List any additional officers in the addendum.
Line 234: Fill in the month or months your elections will be held which must be a month a General Membership Meeting is held.
Line 243: Fill in the date your elected officers will assume their positions. The PTA operational and fiscal years runs July 1 – June 30.
Line 244: Fill in the length of the elected officer's terms.
Line 245: Fill in the maximum number of additional terms elected officers are allowed to serve.

Page 9: Article VIII: Executive Committee, Section 4B. Meetings
Line 362: Fill in the number of days' notice that will be provided to the Executive Committee members in the event of a special meeting of the committee.

Page 10: Article IX: Board of Directors, Section 5B. Meetings
Line 409: Fill in the number of days' notice that will be provided to Board of Director members in the event of a special meeting of the board.

Page 11: Article X: Committees, Section 5. Nominating Committee
Line 453: Designate the number of members for the Nominating Committee (no less than three members and an uneven number).
Line 458: Fill in the month or months the Nominating Committee reports at the General Membership meeting in which elections will be held.

Page 12: Article XI: General Membership Meetings

Line 473: Section 1. Meeting Dates. Fill in the months your unit will hold general membership meetings. Be sure to include the month/months your election is held.

Line 480. Section 3. Quorum. Fill in a quorum of at least twice the number of officers listed in Article VI: Officers and Their Elections, Section 3 and any additional officers listed by your unit in the addendum, plus one. This is to prevent the perception that the officers could conduct business of the association by themselves.

Line 482. Elections Meeting. Fill in the month or months your elections will be held. This must be a month or months a General Membership Meeting is held.

Page 13: Addendum. List any changes made to the Bylaws other than the information inserted in the blanks. Please include the page number plus article and section number when listing the changes. An example:
Page 12, Article XI, Section 4. Elections meeting. **Current wording:**
The annual elections meeting shall be held in the month of April.

The proposed change will be to:
The annual elections meeting shall be held in the month of May.

Questions? Send a note to bylaws@LouisianaPTA.org.

STANDING RULES

Local PTA Units should have their own set of standing rules. The following guidelines for local standing rules are suggestions and should be attached to your standing rules for ongoing reference and instruction. PTAs should adapt the wording to apply to them. Standing rules are the rules your PTA adopts to administer affairs under the provisions of your Bylaws. Standing rules must conform to and may not conflict with your Bylaws. Standing rules are generally not adopted when a PTA is newly organized but are developed and adopted as needs arise.

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

Standing rules are more flexible than Bylaws. They do not contain parliamentary procedure but are adopted and amended. Standing rules are kept with your Bylaws in your officers' procedure books and passed on to incoming officers. All Board members and committee chairs should have a copy of your standing rules. Your bylaws and standing rules need to be studied by your incoming officers as soon as they are elected and reviewed frequently for understanding and training and to ensure they are still accurate and applicable. Your secretary shall have a copy of your standing rules available at all PTA meetings.

Each set of standing rules is unique. No two are alike because no two PTAs are alike. Your standing rules may be organized in any way you desire, such as in articles and sections as in your bylaws, in numerical order as they are adopted, in topic and sub-topic groups, etc. Developing standing rules is not difficult. They may be adopted individually in a General Membership meeting as the need arises.

To adopt a set of standing rules, appoint a committee of at least three experienced, knowledgeable members of your PTA to prepare a set of standing rules. Using your bylaws as a starting point, the committee should consider each provision and then formulate instructions for applying it. The minutes of Board and General Membership meetings and the experience of committee members are additional resources. After the committee has prepared the standing rules, they are presented to your Board for review and then to your General Membership for approval by a majority vote.

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

Detailed information about the following additional topics and more could be included in your standing rules:

- Titles and specific duties of the vice presidents
- Orientation of new Board Members
- Procedure books
- Meetings
- Details for all standing and special committees, which could include finance, membership, public relations, newsletter, volunteers, programs, legislation, Reflections, Financial Resources, teacher appreciation, hospitality, etc.
- Committee duties, who serves on them, and how committee members are determined
- Needs assessment
- Student involvement
- Fiscal policies and procedures, including location of bank and updating signature cards and debit cards at the bank
- Nominating Committee instructions
- Installation of new officers
- Information and requirements for special recognitions and awards
- Equipment your PTA owns and where it is located
- LAPTA meetings and who attends

ARTICLES OF INCORPORATION

Louisiana law requires that all non-profits register with the Louisiana Secretary of State's office. There is a $75 initial fee to file Articles of Incorporation with the Louisiana Secretary of State at **geauxbiz.com**.

The PTA must file the Annual Report yearly updating its officers. Visit the Louisiana Secretary of State at geauxbiz.com to renew, set up annual email reminders, update the officers, and pay a $15 renewal fee. The Articles of Incorporation shall be kept permanently on file and is part of the annual Active Affiliation Report that is submitted to LAPTA.

After logging into geauxbiz.com under "Quick Links," select "File Annual Report." Or click "Get Started" button. Select "File an amendment, such as an annual report, with the Louisiana Secretary of State." Follow the steps to update officer data.

R. Kyle Ardoin
Secretary of State

DOMESTIC CORPORATION
ANNUAL REPORT
For Period Ending
3/11/2021

34521007N
2021

Mailing Address Only (INDICATE CHANGES TO THIS ADDRESS IN THIS BOX)
34521007 N
MADISONVILLE JUNIOR HIGH SCHOOL PTA

106 CEDAR STREET
MADISONVILLE, LA 70447

1

(INDICATE CHANGES TO THIS ADDRESS IN THIS BOX)
Registered Office Address in Louisiana (Do not use P. O. Box)
106 CEDAR STREET
MADISONVILLE, LA 70447

Federal Tax ID Number

Our records indicate the following registered agents for the corporation. Indicate any changes or deletions below. All agents must have a Lou... Do not use a P. O. Box.
A NEW REGISTERED AGENT REQUIRES A NOTARIZED SIGNATURE.
PATRICIA WELCH
106 CEDAR ST MADISONVILLE, LA 70447

I hereby accept the appointment of registered agent(s).

Sworn to an... scribed befo...
NOTARY ... MUST BE TYP... PRINTED WITH NOTARY #

New Registered Agent Signature | **Notary Signature** | **Date**

This report reflects a maximum of three officers or director... our records for this ...porat... Indicate a... ges or deletions below. Include a listing of all names along with each title held and their address. Do not use a P. O. Box. ... space is nee... attach ... dendum.

BETH MAILLHO
106 CEDAR ST MADISONVILLE, LA 7044... — ...esident
CAROLINE SHOLL
106 CEDAR ST MADIS... ...A 70447 — Vice-President
SHELLI MYERS
106 CEDAR ST MADISO... ...LLE, L... — Treasurer

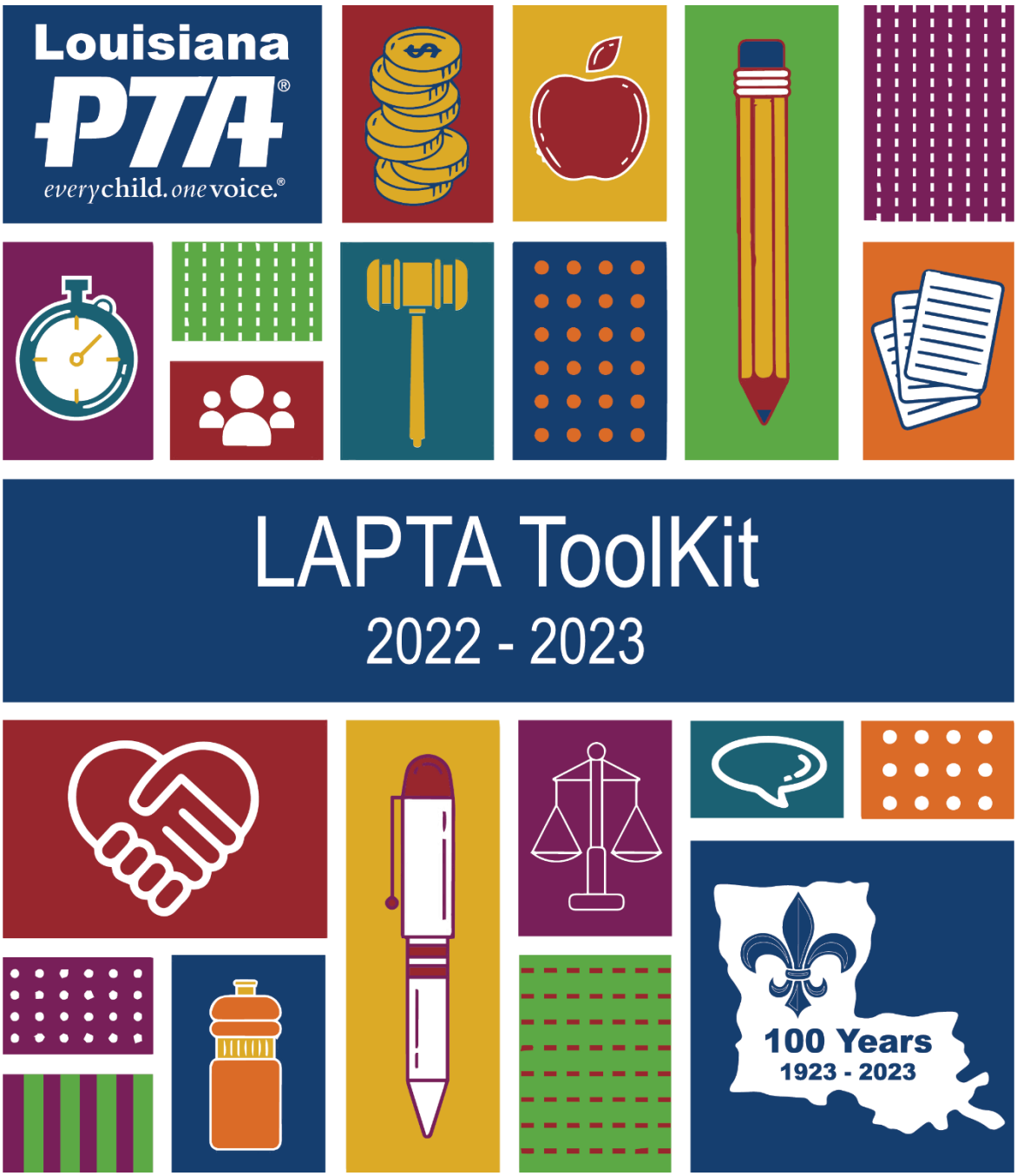
The filing of a false ... record, with the knowledge of its falsity, is a crime, subjecting the filer to the fine or imprisonment or both under R.S. 14:133.

SIGN →	To be signed by an officer or director	Title	Phone	Date
	Beth Maillho (SIGNED ELECTRONICALLY)	President		02/09/2021
	Signee's address	Email Address		(For Office Use Only)
		ON FILE		

Enclose filing fee of $10.00
Return by: 3/11/2021
Make remittance payable to Secretary of State
Do Not Send Cash
Do Not Staple
To: Commercial Division
P. O. Box 94125
Baton Rouge, LA 70804-9125
Phone (225) 925-4704
web site: www.sos.louisiana.gov
DO NOT STAPLE

4

SAMPLE



Awards, Grants, & Contests
2022 – 2023
Section 11

INDEX

Monthly Membership Challenges....3
Annual Membership Awards....3
Centennial Button Pins....3
Safety Poster Contest and Sample Flyer....4
Love Louisiana Video Challenge and Sample Flyer....6
Reflections Theme Search Contest....8
Reflections Program....9
Outstanding PTA Newsletter Award....10
Advocacy Award for Local PTA Unit....11
Advocacy Award for Students....12
Volunteer of the Year Award....13
Mentor-a-PTA Award....14
Apply for National PTA Grants....15
Top Grant Writing Tips....15
Louisiana PTA Grants Overview....16
$750 LAPTA Reading & Literacy Grant Application....17
$750 LAPTA Healthy Minds Grant Application....18
$500 LAPTA Day of Service Grant Application....19
$500 Creative Teacher Grant Application....20
$75 National PTA Virtual Legislative Convention Grant Application....21
$75 National PTA Virtual Convention Grant Application....22

AWARDS, GRANTS, & CONTESTS SUMMARY

Membership Awards:

August “Early Bird“ Award
September “Head Start” Award
November “Geaux PTA” Award
December “Lagniappe” Award
January “Welcome Back” Award
February “Founders’ Day” Award
Membership Super Grower Award
Membership Marvel Award
Golden Apple Award
Platinum One Voice for Every Child Award
Gold One Voice for Every Child Award
Silver One Voice for Every Child Award

Advocacy Awards:

Outstanding Advocates for Children for a PTA Unit
Outstanding Advocates for Children for a Student
Be the Voice for a PTA Unit
Be the Voice for a Student

Other Awards:

Outstanding Newsletter Award
Mentor-A-PTA Award
Volunteer of the Year Award

Contests and Reflections:

Fire Prevention Safety Poster Contest
Love Louisiana Video Challenge
Reflections Theme Contest
Reflections Program with Many Awards

Grants from LAPTA:

$750 Reading & Literacy Grants
$750 Healthy Minds Grants
$500 Day of Service Grants
$500 Creative Teacher Grants
$75 National PTA Virtual Legislative Conv. Grants
$75 National PTA Virtual Convention Grants

MONTHLY MEMBERSHIP CHALLENGES

LAPTA has a goal of 12,100 members for our 100th year in 2022-23 and we need our Local PTA Units to help reach that goal! To be eligible for awards, all PTAs must have Active Affiliation status. The qualifying PTA units will receive recognition and automatically be entered into a monthly drawing for $100!

August

Early Bird Award

Submit 25 members by August 31 plus Officer Data at LouisianaPTA.org/submit-officer-data-1

September

Membership Head Start Award

Jump start the PTA with 50% or more of the previous year's PTA membership by September 30

November

Geaux PTA Award

File Active Affiliation Report and get more than 100% of previous year's PTA membership by Nov. 30.

December

Lagniappe Award

Achieve 125% of the previous year's membership and completed Active Affiliation Packet by December 31

January

Welcome Back Award

Keep up momentum with 10 new members by January 31

February

Founders' Day Membership Challenge

In honor of our PTA Founders' Day on February 17, add 17 new members by February 28

ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 11,100 members for our 100th year in 2022-23 and we need our Local PTA Units to help reach that goal! Qualification for awards is done without application. LAPTA uses the information on the top of the Excel Local PTA Unit Membership Report emailed to submit@LouisianaPTA.org by March 15, 2023. The annual membership awards will be announced at the General Membership Meeting on March 25, 2023.

Super Grower

Greatest increase from previous year

Membership Marvel Award

Increase membership by 10% over the previous 2-year average or reach your goal from LAPTA

Golden Apple Award

100% membership of teachers and administrators

Platinum One Voice for Every Child Award

Recruit members equal to 100% of student enrollment

Gold One Voice for Every Child Award

Recruit members equal to 75% of student enrollment

Silver One Voice for Every Child Award

Recruit members equal to 50% of student enrollment

CENTENNIAL BUTTON PINS

It is a special birthday for LAPTA! To celebrate our centennial year, every member will receive a free 1 ½ inch pin-on button with the "Here We Geaux!" slogan from LAPTA! 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 is a big deal!. Please pass that enthusiasm and pride on to the members!

SAFETY POSTER CONTEST
FIRE PREVENTION WEEK
100TH ANNIVERSARY

National Celebration Week: October 9-15, 2022
Quantity Offered: 9 (Three/category)
Submit Entries: https://form.jotform.com/221746113272146

Deadline to submit to LAPTA: October 18, 2022
LAPTA Winners Announced: October 21, 2022

As Louisiana PTA observes its Centennial Celebration, the Fire Prevention Week Program and Sparky the Fire Dog are also 100 years old! Fire Prevention Week is October 9-16, 2022. Check out nfpa.org/FPW for fire safety messages, activities, materials, games and apps, lesson plans, safety tip sheet, and more. Students can draw a Fire Prevention Safety Poster on regular 8½ X 11 white paper. Local PTA Units can pick three winners per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-6) and Special Artist Category (students of all ages with an ADA Section 504). Deadline to submit posters to LAPTA is October 18, 2022. LAPTA winners will be announced October 21, 2022.

There are several ways this can be organized. The PTA could choose to have the teachers do the contest in their classrooms, an art teacher could organize it, or it could be done at home by the students. Provide the copy paper for students, or they could even draw on the back of the flyer. Perhaps the local fire department could make a presentation to the students.

How to Submit Local PTA Winners to LAPTA

1. The Local PTA Unit picks three winners per Grade Category to submit to LAPTA for consideration. Ensure that all winners have signed a Media Release Form with the school. Take a picture of the winning posters in good lighting from directly above the picture.
2. Go to https://form.jotform.com/221746113272146 or scan the QR Code. Complete the form and upload the image by October 18, 2022. Information you will need is PTA name, Grade Category, student name, grade, and parent contact information. Repeat for each winner from your school.

SAMPLE SAFETY POSTER CONTEST FLYER
FIRE PREVENTION WEEK
100TH ANNIVERSARY
DEADLINE: Friday, October 14, 2022

The National Fire Prevention Week Program, Sparky the Fire Dog, and Louisiana PTA are 100 years old! In observance of Fire Prevention Week, which is from October 9-16, 2022, students can draw and color a Fire Safety Poster on regular 8½ X 11 white paper. Students can use the back side of this flyer. What are some ways you can be safe when you are around fire?

Check out nfpa.org/FPW for fire safety messages, activities, materials, games and apps, lesson plans, safety tip sheet, and more.

There will be three Awards of Merit winners for each grade and three Awards of Excellence winners per Grade Category (adjust as needed) that will move on to the Louisiana PTA Safety Poster Contest. The Grade Categories are Primary (Pre-K - Grade 2), Intermediate (Grades 3-6) and Special Artist Category (students of all ages with an ADA Section 504).

Deadline to submit Safety Posters to the PTA is **Friday, October 14, 2022**.
Winners will be announced Wednesday, October 19, 2022.
Louisiana PTA will announce its winners on Friday, October 21, 2022.

Include how the contest will be organized. The PTA could choose to have the teachers do the contest in their classrooms, an art teacher could organize it, or it could be done at home by the students. Provide ample notice. Provide the copy paper for students, or they could even draw on the back of the flyer. Adjust your deadlines appropriately to be able to **submit to LAPTA by October 18, 2022**.

LAPTA "LOVE LOUISIANA" VIDEO CHALLENGE

Application Deadline: February 28, 2023 Submit Entres: https://form.jotform.com/221775295270157
Winners Announced: March 25, 2023 Quantity Offered: 15 (Three/category)

As Louisiana PTA observes its centennial celebration this year, we are kicking off the *Love Louisiana Video Challenge* to celebrate all things wonderful about Louisiana and our children's education. LAPTA wants video submissions from students expressing what makes Louisiana special. There will be three winners in each of the Grade Categories: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12) and Special Artist Category (students of all ages with an ADA Section 504). Winning videos will be shown at the LAPTA Centennial Celebration on March 25, 2023.

Students will independently make a short film no longer than one minute with the **"Love Louisiana"** theme. The student producing the film is not required to appear in the film. All screenwriting, directing, and editing must be done by the student producer with original student footage. "Special Artist" students may have appropriate assistance as needed. The Local PTA Unit will pick three winners per Grade Category to forward to LAPTA for state award consideration by the deadline of February 28, 2023.

An artist statement shall be included in the email submission. Include an explanation of the storyline or the significance of the film style. Entries will be judged on how well the student uses their artistic vision, originality, and creativity to portray the theme. Entries may include public places, well-known products, trademarks, or certain other copyrighted material only if it is nonessential to the subject matter of the piece. Only new videos inspired by the theme may be submitted. Each entry must be the original work of one student only. Video may not exceed one minute in length and 1,000 MB in file size. Use of background music must be cited.

Local PTA Units are encouraged to share their winning videos on social media with the hashtags #LAPTA #LouisianaPTA and #LoveLouisianaChallenge."

YouTube KIDS

National PTA promotes safe digital and social media use. Talk regularly with your children about their digital lives and how they can be responsible and safe in all online activities. A wide range of tools and features on many social media apps help parents take an active role with safety options. Did you know YouTube Kids promotes mental health for the month of May? Search "YouTube Kids mental health" for videos.

How the Local PTA Unit Submits Entries

1. **The deadline for Local PTA Units to submit three entries per Grade Category to LAPTA is February 28, 2023.** Set your own deadline with your students to give yourself enough time to evaluate your submissions.
2. Go to **https://form.jotform.com/221775295270157** or scan the QR Code. Complete the form and upload the video by February 28, 2023. Information you will need is **PTA name, PTA LUR#, Grade Level Category, student producer name, grade, homeroom teacher, parent contact information, short artist statement, music citation, and video.** Repeat for each winner from your school.

See the *Local PTA Sample Flyer* on the next page.

LOCAL PTA SAMPLE FLYER
LOVE LOUISIANA" VIDEO CHALLENGE
BY_____ PTA

Example Deadline: February 10, 2023

As Louisiana PTA observes its Centennial Celebration, it is kicking off the *Love Louisiana Video Challenge* to celebrate all things wonderful about Louisiana and our children's education. ____ PTA wants video submissions from students expressing what makes Louisiana special. The winners will be entered into the Louisiana PTA Love Louisiana Video Challenge and shown at the LAPTA Centennial Celebration on March 25, 2023 in Baton Rouge!

RULES Videos can be produced on any video platform. Students will independently make a short video no longer than one minute with the **"Love Louisiana"** theme. All writing, directing, and editing must be done by the student producer with original student footage. Video may not exceed 1,000 MB in file size. Use of background music must be cited. Include an artist statement with an explanation of the storyline. Students may enter by their grade level or in the "Special Artist" Category (students of all ages with an ADA Section 504). Entries will be judged on how well the student uses their artistic vision, originality, and creativity to portray the theme. **Deadline to submit a video is February 10, 2023**. Winners will be announced on February 28, 2023.

DIGITAL SAFETY National PTA promotes safe digital and social media use. Talk regularly with your children about their digital lives and how they can be responsible and safe in all online activities. A wide range of tools and features on many social media apps help parents take an active role with safety options. YouTube Kids promotes mental health for the month of May. Search YouTube Kids Mental Health for more.

TO ENTER **1) Return this form by February 10, 2023 and 2) submit the video by email to _____ _____.** The email subject is **Love Louisiana Video Challenge.** Include in the body of the email the **student producer's name, grade or "Special Artist," teacher, music citation, short artist statement, and parent contact information.**

Student Name _____ Grade _____ Teacher _____
Parent Name _____ Phone_____ Email_____
Music Citation _____ Special Artist Entry? YES NO
Attach Artist Statement or write it neatly here. _____

_____

_____

Ownership of entries remain the property of the entrant. Entry into this program constitutes entrant's irrevocable permission and consent that PTA may display, copy, reproduce, enhance, print, sublicense, publish, distribute, and create derivative works for PTA purposes. PTA is not responsible for lost or damaged entries. Submission of entry constitutes acceptance of all rules and conditions. I agree to the above statement.

Student Signature _____ Parent Signature _____

Questions? Contact _____ at _____ or _____.

**PTAs can choose any means for video submittal. Test the function of your video submission. LAPTA uses JotForm which charges a fee. We created a template for your use. Click *create a new form*, *use template*, then search "*Love Louisiana Video Contest*." If you use JotForm, delete the form blanks above and only send out the information advertising the contest. Include the link & QR Code to your JotForm for students' submissions.

2024 - 25 REFLECTIONS THEME SEARCH

Deadline: November 10, 2022 Submit Entries: https://form.jotform.com/221745830340147
Winners Announced: November 28, 2022

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

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

The Reflections Theme for this year by Jason Yevin from Salk/Macarthur PTSA in New York was "Show Your Voice."

To participate, students go to https://form.jotform.com/221745830340147 or scan the QR Code to submit their entry directly with Louisiana PTA. They should check out the past winning themes at the bottom of the entry portal to make sure they do not duplicate past themes.

Download this image and share on social media or as a flyer to students!

REFLECTIONS PROGRAM

PTA Unit Winners Due to LAPTA: January 15, 2023 LAPTA Winners Announced: March 1, 2023

National PTA has a long-standing commitment to arts education. The Reflections program provides opportunities for recognition and access to the arts, which boost student confidence and success in the arts and in life. Each year, over 300,000 students in Pre-K through Grade 12 create original works of art. This 50+ year old program helps them explore their own thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning that will help them become more successful. The Reflections theme is ***Show Your Voice!***

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

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

The Local PTA Unit submits their winners to LAPTA by January 15, 2023. Please set your deadlines earlier to give yourself enough time to pick your winners. All winners are submitted through an online portal. Local Units must be Actively Affiliated with LAPTA by October 28, 2022, for their students to participate.

Reflections Guidelines and Deadlines

- Local PTA Units first pre-register at https://www.surveymonkey.com/r/22-23ReflectionsRegistration to provide National PTA information on the number of Local PTA Units planning to participate.
- **Go to LouisianaPTA.org/reflections** for all details, support documentation, and links.
- The Student Entry Portal link will be shared in the fall. This is the platform LAPTA uses to accept entries.
- Zoom training and written guidance will be provided by LAPTA.
- LAPTA accepts entries in all six Arts Categories. The Local PTA Unit can decide which Arts Categories their students can enter.
- Eligible Local PTA Units can submit three entries from each Arts Category per Grade Category to LAPTA for judging at the state level. If your school has more than one Grade Category, you may submit three entries for each Grade Category. The Grade Categories are Primary (Pre-K to Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12), and Special Artist (all students with an ADA Section 504).
- **ENTRY DEADLINE to LAPTA is January 15, 2023** through the online Student Entry Portal**.**
- There will be six LAPTA state winners per Grade Category per Arts Category announced on **March 1, 2023**. We will celebrate our winners in person at the LAPTA Centennial Celebration on March 25, 2023!
- All information and forms are available at https://LouisianaPTA.org/reflections.
- Questions? Please contact us at arts.education@LouisianaPTA.org.

OUTSTANDING PTA NEWSLETTER AWARD

Application Deadline: February 1, 2023 Apply at: https://form.jotform.com/221745628447059
Winners Announced: March 25, 2023 Quantity Offered: 3

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

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

Judge's Rubric (130 Possible Points)

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

To Apply for the Award

1. Collect all publications from July 1, 2022, through February 1, 2023, in chronological order and combine them into one PDF. A minimum of three publications is required. Only PTA newsletters or emails may be entered. See the Judge's Rubric for content ideas.
2. Go to https://form.jotform.com/221745628447059 or scan the QR code. Complete the information and upload the document at the LAPTA Outstanding PTA Newsletter Award Application by February 1, 2023. Information you will need is PTA Name, LUR#, school name and address, contact's email and phone, editor's name, and total publications between July 1, 2022, and February 1, 2023. Winners will be announced on March 25, 2023.

ADVOCACY AWARD FOR FOR LOCAL PTA UNITS

Application Deadline: February 1, 2023 Apply at: https://form.jotform.com/221794928286067
Winners Announced: March 25, 2023 Quantity Offered: 2

Local PTAs can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation of the completed advocacy work **online by February 1, 2023.** Winners are announced on March 25 at the Centennial Celebration in Baton Rouge.

Local PTA Name	LUR#	Parish
Your Name	Email	
PTA Position or Role	Phone	

PTA Website	PTA Facebook Page	PTA Twitter	PTA Instagram

To be eligible for Outstanding Advocates for Children (OAC) Award, Local PTA Units must have completed at least four *Building Awareness Activities* and at least six *Civic Engagement Activities*. To be eligible for Be the Voice (BTV) Award, Local PTA Units must have completed at least three *Building Awareness Activities* and at least four *Civic Engagement Activities*.

Application for: ❒ Outstanding Advocates for Children (OAC) ❒ Be the Voice (BTV)

1. Select the completed **Building Awareness Activities. *Attach documentation for each item.***
   - ❒ Educate and communicate LAPTA legislative issues through social media, newsletters, programs, and other avenues to PTA members and the community at large.
   - ❒ Share advocacy updates and information from LAPTA and how to sign up for the LAPTA newsletter.
   - ❒ Share LAPTA advocacy alerts to membership.
   - ❒ Host programs or family events. Pick a legislative priority topic and build a community event around that issue. For example, invite guest speaker, discuss topics, and have a related activity.
   - ❒ Collaborate with other local PTAs.
   - ❒ If appropriate, seek community partners and other association relationships to elevate your work.
2. Select the completed **Civic Engagement Activities. *Attach documentation for each item.***
   - ❒ Write letters or postcards to share your concerns or support regarding LAPTA legislative issues.
   - ❒ Make phone calls to elected officials in response to LAPTA Legislative Alerts.
   - ❒ Meet with legislator or legislative staffer to discuss LAPTA legislative priorities. Collaboration with other local PTAs is encouraged.
   - ❒ Give legislators school tours to meet students, parents, counselors, teachers, and administrative staff. Discuss how PTA legislative issues impact your campus and community.
   - ❒ Attend an event at the Louisiana State Capital.
   - ❒ Attend other forums pertaining to public education, child health, and child safety that align with PTA's goals.
3. Attach further information or documentation that strengthens your application.

Submit application online at https://form.jotform.com/221794928286067 or scan the QR Code **by February 1, 2023. Winners will be announced on March 25, 2023.**

ADVOCACY AWARD FOR STUDENTS

Application Deadline: February 1, 2023 | Apply at: https://form.jotform.com/221794914529163

Winners Announced: March 25, 2023 | Quantity Offered: 2

LAPTA accepts applications for our Student Advocacy Award program to recognize students who help to truly enhance public education. Students who are involved with civic engagement at an early age are the pillars of Louisiana's future! Students can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation substantiating the completed advocacy work online. **Application deadline Is February 1, 2023**. Winners will be announced March 25, 2023.

Student Name	Local PTA at the Student's School
School Name	Parish
Parent Name	Parent Email

To be eligible for Outstanding Advocates for Children (OAC) Award, students must have completed at least two *Civic Engagement Activities*. To be eligible for Be the Voice (BTV) Award, students must have completed at least one *Civic Engagement Activities*.

Application for: ❒ Outstanding Advocates for Children (OAC) ❒ Be the Voice (BTV)

1. Select the completed **Civic Engagement Activities. *Attach documentation for each item.***
   - ❒ Sponsored voter registration drive.
   - ❒ Hosted voter education program.
   - ❒ Hosted a program or campaign about a LAPTA legislative priority issue.
   - ❒ Met with legislators representing student's school community.
   - ❒ Created an online candidate questionnaire regarding PTA legislative priorities.
   - ❒ Other community engagement.

2. Attach further information or documentation that strengthens the application.

Submit application online at https://form.jotform.com/221794914529163 or scan the QR Code **by February 1, 2023. Winners will be announced on March 25, 2023.**

VOLUNTEER OF THE YEAR AWARD

Application Deadline: February 28, 2023 Apply at: https://form.jotform.com/221787194277165
Winner Announced: March 25, 2023 Quantity Offered: 1

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

Recognize your very best! Think of the people your PTA might like to honor with a Volunteer of the Year Award, people who care about children and have spent their lives caring about and devoted to the service of children and youth:

- A PTA leader, past or present
- The quiet, reliable, unassuming volunteer
- An outstanding teacher, perhaps one who is retiring this year
- A senior citizen who serves as a volunteer in the school
- A school crossing guard who ensures the children get to school safely for years
- A police officer or juvenile protection worker
- A legislator who has worked for laws benefiting children

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

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

Applications must be submitted online at https://form.jotform.com/221787194277165 or scan the QR Code.

MENTOR-A-PTA AWARD

Deadline for Award Application: February 28, 2023 Apply at: https://form.jotform.com/221777772070056
Winners Announced: March 25, 2023 Quantity Offered: 2

LAPTA also offers a Mentor-a-PTA Program where a strong, healthy PTA mentors a smaller, protected, or new PTA unit (Mentee) who needs a helping hand with the implementation of PTA values and goals through PTA best practices, guidance, and possible financial contributions. As we are all part of Louisiana, the success of one is the success of all. LAPTA encourages our Mentor PTAs to support the other PTAs that are not as strong or are in need. A Mentee PTA might like to sit in on a Board meeting or review your agendas, Welcome Packet, membership forms, school flyers, and more.

Be a Mentor or Mentee

If your PTA would like to be paired up with another PTA as either the Mentor or the Mentee, please email Kayla Pagel at President@LouisianaPTA.org. There is no deadline for this.

How can you reach out to others in your community and state? The focus of this program is to mentor through guidance, planning ideas, monthly check-in, and leadership support. Mentors are upbeat, positive advocates who provide tools and direction to the Mentee PTA. If there is a financial contribution, then it must be approved by the General Membership and included in the annual budget. Give the members ownership in the philanthropic work of the PTA. Other non-financial support does not need approval, but you always want your members to know the good that PTA does behind the scenes.

Award Application

The Mentor-a-PTA Award recognizes philanthropic work from one PTA to another PTA. To nominate a PTA for the Mentor-a-PTA Award, apply online at https://form.jotform.com/221777772070056 or scan the QR Code. The information needed is the PTA name and city, contact person's name, phone, and email, and a **good description of the philanthropic work** done by the nominated PTA.

APPLY FOR NATIONAL PTA GRANTS

National PTA offers over 500 grant opportunities annually. Share with LAPTA any grants that you receive so that we can celebrate your accomplishments! If you don't receive a grant the first time, apply again. Visit PTA.org, go under the *Run Your PTA* menu, and select *Award & Grant opportunities* for more information.

TOP GRANT WRITING TIPS

For many organizations, grant writing is the most important component of their fundraising strategy. When trying to secure funding for a nonprofit, it's important to learn how to write a strong, successful proposal. Here's what you need to know to get started. The best grant proposals are clear, organized documents that illustrate why your organization should receive funds from the grantor.

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

- **Know What Grants Exist and When to Apply**. Sign up for National PTA's newsletters at PTA.org/SignUp and bookmark the grants page at PTA.org/Grants.
- **Tell a Compelling Story**. Make sure all your answers work together to highlight your PTA's strengths and mission or the reason why you're here.
- **Share How the Grant Would Impact Your School Community**. Identify an existing need in your school community and explain how the grant will address that need.
- **Show Your Enthusiasm**. Say how the grant will provide an exciting opportunity for your school and PTA.
- **Answer All Parts of the Question**. Include concrete, detailed examples and explanations that expressly answer the questions asked.
- **Promote Family Engagement**. Demonstrate how this grant will help you build stronger families in your community and encourage all families to attend your event.
- **Get a Second Set of Eyes**. Ask someone to proofread your work for spelling, grammar, and clarity before submitting the application.

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

LOUISIANA PTA GRANTS

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

$750 LAPTA Reading & Literacy Grants

Application Deadline: November 4, 2022 Quantity Offered: 4

The four LAPTA Reading and Literacy Grants help Local PTA Units host literacy programs at their affiliated schools. For possible programs, reference PTA.org/home/programs/family-reading. Literacy skills in Louisiana are unacceptably low, and LAPTA and National PTA are making literacy opportunities a priority for our children.

$750 LAPTA Healthy Minds Grants

Application Deadline: March 27, 2023 Quantity Offered: 4

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

$500 LAPTA Day of Service Grants

Application Deadline: February 17, 2023 Quantity Offered: 4

The four LAPTA Day of Service Grants encourage Local PTA Units to reach beyond the school and into the community to make a difference. Where is there a need? Who needs the PTA? February 17 is the National PTA Founders' Day! How can you continue the legacy of PTA?

$500 LAPTA Creative Teacher Grants

Application Deadline: February 28, 2023 Quantity Offered: 2

The two LAPTA Creative Teacher Grants support creative, innovative, and fun programs or projects for students. Grants may fund any activity or material which supports student enjoyment, wonder, and engagement.

$75 National PTA Virtual Legislative Convention (LegCon) Grants

Application Deadline: January 20, 2023 Quantity Offered: 20

The twenty National PTA Virtual Convention Grants pay the registration fee for PTA members to virtually attend the National PTA Legislative Convention (LegCon). LegCon is an annual conference where PTA leaders join forces to influence Congress in Washington, DC. The first day is all about introducing the priorities for the year and giving background information. The second day is reserved for meetings with members and staffers.

$75 National PTA Virtual Convention Grants

Application Deadline: February 28, 2023 Quantity Offered: 20

The twenty National PTA Virtual Convention Grants pay the registration fee for PTA members to virtually attend the National PTA Convention. Attendees will be delegates representing Louisiana PTA. Experience all that National PTA does behind the scenes for the children of our country. It is an incredible opportunity!

$750 READING & LITERACY GRANT APPLICATION

Application Deadline: November 4, 2022 Apply at https://form.jotform.com/221748002230038
Winners Announced: December 2, 2022 Quantity Offered: 4 (One/category)

The LAPTA Reading and Literacy Grant for $750 helps Local PTA Units host literacy programs at their affiliated schools. Literacy skills in Louisiana are unacceptably low, and LAPTA and National PTA are making literacy opportunities a priority for our children. For possible programs, reference PTA.org/home/programs/family-reading. One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply.

Local Unit Name		Local Unit Parish	Local Unit LUR#
Mailing Address	City, Zip	Current Membership #	Grades at School
President's Name	Phone	Email	

Does the PTA have Active Affiliation status? ❒ Yes ❒ No

Category Applying for (*more than one choice is allowed*):

❒ Primary (Pre-K – Gr 2) ❒ Intermediate (Gr 3-5) ❒ Middle School (Gr 6-8) ❒ High School (Gr 9-12)

Requirements

- All grant funds must support age-appropriate programs for literacy and reading skills.
- The program must serve a majority of the school population.
- The program occurred after August 1, 2022, or will occur before May 26, 2023.
- Documentation of the implemented program must be emailed to submit@LouisianaPTA.org by May 26, 2023.

Questions

1. What is the name of the school librarian?
2. What are the top three challenges for the librarian?
3. Describe the program the PTA wants to host to increase reading and literacy for their students. Include the goals, date and time of the event(s), supplies, volunteers needed, and any other details.
4. What are the top three literacy challenges for the children in your community?
5. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by May 26, 2023, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility for future grants.

Applications must be submitted online at https://form.jotform.com/221748002230038 or scan the QR Code.

$750 HEALTHY MINDS GRANT APPLICATION

Application Deadline: March 27, 2023 Apply at https://form.jotform.com/221748198534162

Winners Announced: May 1, 2023 Quantity Offered: 4 (One/category)

The LAPTA Healthy Minds Grants encourage Local PTA Units to host mental health activities, events, or programs at their supported schools. It is important to support the mental health of all children before, during and after challenges arise and to support parents' and caregivers' mental health, too! National PTA developed the PTA Healthy Minds Program to empower families to make mental health an everyday priority. One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply online.

Local Unit Name		Local Unit Parish	Local Unit LUR#
Mailing Address	City, Zip	Current Membership #	Grades at School
President's Name	Phone	Email	

Does the PTA have Active Affiliation status? ❒ Yes ❒ No

Category Applying for (*more than one choice is allowed)*:

❒ Primary (Pre-K – Gr 2) ❒ Intermediate (Gr 3-5) ❒ Middle School (Gr 6-8) ❒ High School (Gr 9-12)

Requirements

- All grant funds must support an age-appropriate mental health activity, event, or program.
- The program must serve a majority of the school population.
- The program occurred after January 1, 2023, or will occur before May 24, 2024.
- Documentation of the implemented program must be emailed to submit@LouisianaPTA.org by May 24, 2024.

Questions

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

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by May 24, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.

Applications must be submitted online at https://form.jotform.com/221748198534162 or scan the QR Code.

$500 DAY OF SERVICE GRANT APPLICATION

Application Deadline: February 17, 2023 Apply at https://form.jotform.com/221748846538166
Winners Announced: March 25, 2023 Quantity Offered: 4 (One/category)

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

Local Unit Name		Local Unit Parish	Local Unit LUR#
Mailing Address	City, Zip	Current Membership #	Grades at School
President's Name	Phone	Email	

Does the PTA have Active Affiliation status? ❒ Yes ❒ No
Category Applying for (*more than one choice is allowed)*:
❒ Primary (Pre-K – Gr 2) ❒ Intermediate (Gr 3-5) ❒ Middle School (Gr 6-8) ❒ High School (Gr 9-12)

Requirements

- All grant funds must support a community outreach program.
- The school families must support the program.
- The program occurred after January 1, 2023, or will occur by December 31, 2023.
- Documentation of the implemented program must be emailed to submit@LouisianaPTA.org by May 24, 2023.

Questions

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

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by January 31, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.

Applications must be submitted online at https://form.jotform.com/221748846538166 or scan the QR Code.

$500 LAPTA CREATIVE TEACHER GRANT APPLICATION

Application Deadline: February 28, 2023 Apply at https://form.jotform.com/221796420623152
Winners Announced: March 25, 2023 Quantity Offered: 2

LAPTA offers Creative Teacher Grants to classroom teachers to fund creative, innovative, and fun programs or projects for students. Grants may fund instructional and classroom materials, videos, parent involvement programs, or any activity or material which supports student enjoyment, wonder, and engagement. Funds must be used between August 1, 2023, and May 31, 2024.

Proposal shall be clear and logical and include a specific objective; a creative or innovative approach; clear description of instructional procedures, methods, or treatments; and emphasis on student enjoyment, wonder, and excitement. The teacher or group of teachers must be a current PTA member at their school.

Our hope is that this grant will result in fun and enriching projects or opportunities for the students that would not otherwise have been possible.

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

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

The applicant fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by June 30, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.

Applications must be submitted online at https://form.jotform.com/221796420623152 or scan the QR Code.

$75 NATIONAL PTA VIRTUAL LEGISLATIVE CONVENTION GRANT

Application Deadline: January 20, 2023 Apply at https://form.jotform.com/221776439055159

Winners Announced: February 28, 2023 Quantity Offered: 20

The National PTA Virtual Convention Grant pays the registration fee for PTA members to virtually attend the National PTA Legislative Convention (LegCon). LegCon is an annual conference where PTA leaders join forces to influence Congress in Washington, DC. The first day is all about introducing the priorities for the year and giving background information. The second day is reserved for meetings with members and staffers.

Local Unit Name		Local Unit Parish	LUR#
Mailing Address	City, Zip	Current Membership #	Grades at School
President's Name	Phone	Email	

Does the PTA have Active Affiliation status? ❒ Yes ❒ No

Requirements:

- All grant funds must be used to attend LegCon.
- Documentation of attendance must be emailed to submit@LouisianaPTA.org by May 1, 2023.

Questions:

1. How many people want to attend LegCon?
2. What is/are the name(s) and current PTA positions (if applicable) of those wanting to attend LegCon?
3. What are the advocacy goals of the Local PTA Unit?
4. How will the knowledge from LegCon be shared with parents, families, and the community after the convention?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. Documentation of LegCon attendance is due to submit@LouisianaPTA.org by May 1, 2023, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.

Applications must be submitted online at https://form.jotform.com/221776439055159 or scan the QR Code.

$75 NATIONAL PTA VIRTUAL CONVENTION GRANT

Application Deadline: February 28, 2023 Apply at https://form.jotform.com/221787416402152

Winners Announced: March 25, 2023 Quantity Offered: 20

The twenty National PTA Virtual Convention Grants pay the registration fee for PTA members to virtually attend the National PTA Convention. Attendees will be delegates representing Louisiana PTA. Experience all that National PTA does behind the scenes for the children of our country. It is an incredible opportunity and will be done from the comfort of your own home! Applications are submitted online.

Local Unit Name		Local Unit Parish	LUR#
Mailing Address	City, Zip	Current Membership #	Grades at School
President's Name	Phone	Email	

Does the PTA have Active Affiliation status? ❒ Yes ❒ No

Requirements:

- All grant funds must be used to attend the 2023 National PTA Virtual Convention.
- Documentation of attendance must be emailed to submit@LouisianaPTA.org by July 1, 2023.

Questions:

1. How many people want to attend 2023 National PTA Virtual Convention?
2. What is/are the name(s) and current PTA positions (if applicable) of those wanting to attend 2023 National PTA Virtual Convention?
3. What are the goals of the Local PTA Unit?
4. How will the knowledge from 2023 National PTA Virtual Convention be shared with the parents, families, and community after the convention?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. Documentation of LegCon attendance is due to submit@LouisianaPTA.org by July 1, 2023, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.

Applications must be submitted online at https://form.jotform.com/221787416402152 or scan the QR Code.