

LAPTA is required to submit your Local Unit Officer information to National PTA. National has developed a template roster that we must use in submitting the data and we have converted it to an online form to simplify collection. If your unit has not already done so, please go to <https://louisianapta.org/submit-officer-data-1> as soon as possible and fill in the form on the website.

Budget Approval

The treasurer presents the proposed budget to the Board of Directors for consideration. The board of directors does not take a vote on approval of the budget. The budget is reviewed by the board of directors to make sure all committee expenses have been included and the budget is in line with the missions and goals of the PTA.

The proposed budget is then presented to the general membership for approval. The budget should be presented item by item to allow for discussion and amendment. A majority vote is required for adoption.

Sample Proposed Budget

July 1, 2021 - June 30, 2022

BEGINNING BALANCE \$ 500.00

INCOME

Membership Dues (*Local Portion Only*) \$ 500.00

Festival \$ 2,000.00

Candy Sale \$ 5,000.00

Art Grant \$ 500.00

TOTAL INCOME \$ 8,000.00

TOTAL AVAILABLE FUNDS \$ 8,500.00

EXPENSES

Administrative/Leadership Expenses

Copies \$ 200.00

Incorporation Fees \$ 5.00

Leadership Development (National PTA/Louisiana PTA Conventions) \$ 600.00

Liability Insurance \$ 25.00

Miscellaneous Expenses \$ 50.00

Postage \$ 50.00

State Summer Workshop \$ 30.00

Supplies \$ 50.00

Total Administrative Expenses \$ 1,100.00

Programs and Committees

Art Grant \$ 500.00

Candy Sale Expenses \$ 2,500.00

Cultural Arts \$ 500.00

Festival Costs \$ 500.00

Founder's Day Banquet \$ 50.00

Life Membership \$ 40.00

Membership Promotion \$ 100.00

Newsletter/Publicity \$ 400.00

Reading Enrichment Program \$ 600.00

Teacher Appreciation \$ 500.00

Teacher Grants \$1,000.00

Volunteer Appreciation \$ 200.00

Total Program and Committee Expenses \$6,890.00

TOTAL EXPENSES \$8,000.00

Start Up Funds \$ 500.00

TOTAL \$8,500.00

Date adopted by membership: _____



2021-2022 Local Unit Budget Approval

The submission of this form is required to maintain a unit's good standing. Entries to all recognitions and awards will be **ineligible** unless this form has been submitted in the Good Standing File requirement by November 1, 2021.

Unit Name _____

LUR # _____

Parish _____

The PTA's budget for the 2021-2022 fiscal year was approved at the general membership meeting held on _____.

President's Name: _____

Signature: _____

Treasurer's Name: _____

Signature: _____

PTA Audit

An audit determines the accuracy of the books, detects inconsistencies or errors, provides recommendations for corrective action, protects the financial officers, verifies that funds were sent through channels as appropriate, and assures the membership that the association's resources were managed in a businesslike manner within the regulations established for their use.

The person conducting the audit should always be impartial and not related by blood or marriage nor reside in the same household as the president or other financial officers or any chairmen handling funds.

The auditor is often a member of the budget, programs, or fundraising committees, but is never authorized to sign the PTA's checks.

The auditor may be an elected officer, appointed individual or committee, or a professional hired by the PTA in accordance with the procedures listed in the bylaws.

The president, treasurer, financial secretary, secretary, or committee chairmen handling funds may not audit the finances.

Audit Committee Report

Balance on Hand as of _____ \$ _____

Receipts from to _____ to _____ \$ _____

Total Cash \$ _____

Disbursements from _____ to _____ \$ _____

Balance on Hand as of _____ \$ _____

Bank Statement Balance as of _____ \$ _____

Outstanding Checks:

Check #	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Total Checks Outstanding \$ _____

Balance in Checking Account as of _____ \$ _____

We have examined the books of this PTA and find them to be:

☐ correct.

☐ incomplete.

☐ substantially correct with the following adjustments and recommendations:

☐ incorrect.

Signatures of Committee/Date

_____	_____
_____	_____
_____	_____

Federal Taxes

Although PTA is an organization that operates in the public trust, it must comply with all tax requirements as prescribed for its nonprofit status. As a result, PTAs are required to file federal tax returns depending on their gross receipts (see below).

US nonprofit tax laws require PTAs with gross receipts normally less than or equal to \$50,000 to file a *990N* e-postcard information report annually with the IRS.

PTAs with annual gross receipts normally more than \$50,000 and less than \$200,000 and total assets less than \$500,000 must file *Form 990EZ*.

PTAs with annual gross receipts of \$200,000 or more, or total assets of \$500,000 or more, must file *Form 990*.

Both the *Form 990* and *990EZ* have supplemental schedules that need to be filed. If the association fails to file the appropriate schedules, the IRS will not consider the return filed.

The due date for tax filing is the 15th day of the fifth month after the end of the association's fiscal year. If the **fiscal year** is July 1 through June 30, tax returns must be postmarked no later than November 15. If an extension is required, instructions regarding extensions of time to file are included in the filing instructions for each form.

Always keep a copy of signed tax forms for the PTA's records and note the date that the forms were mailed or submitted.

District St. Tammany LUR # 00032553 Tax I.D. (E.I.N.) [REDACTED]

LOCAL UNIT BYLAWS

School Name Fontainebleau High School

Address 100 Bulldog Drive

Mandeville, LA 70471

October 19, 2020

☒ **APPROVED**

Amy Rhodes-Faula
LAPTA Bylaws Committee

Article I: Name

The name of this association is the **Fontainebleau High School PTSA**, located in **Mandeville, Louisiana**. It is a local **PTSA** organized under the authority of the Louisiana Congress of Parents and Teachers, a branch of the National Congress of Parents and Teachers (National PTA).

Article II: Purposes

Section 1. Objectives. The Purposes of the Louisiana PTA are:

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

Section 2. Awareness. The purposes of the PTA are promoted through advocacy and education in collaboration with parents, families, teachers, educators, students, and the public; developed through conferences, committees, projects and programs; and governed and qualified by the basic principles set forth in Article III.

Section 3. Federal Status. The association is organized exclusively for the charitable, scientific, literary or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code (hereinafter referred to as "Internal Revenue Code").

BYLAWS

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.

HOW TO UPDATE BYLAWS

- **Form a committee** consisting of at least three (3) members. The bylaws committee must be approved as stated in your current bylaws in the Article on Amendments.
- The committee should include experienced and knowledgeable PTA members. A copy of the current bylaws should be provided for each member of the committee to review **BEFORE** the meeting. Your local unit president should have a copy of the current approved bylaws. If not, you can get them from the LAPTA Bylaws chair or the state office at office@louisianapta.org.
- The official bylaws template of the fill-in-the-blank bylaws may be obtained from the Bylaws chair of LAPTA at laptabylaws@gmail.com or from the Louisiana PTA Website, www.louisianapta.org.
- Consider recommendations submitted by your board of directors and general membership.
- As amendments are proposed, make sure the changes meet the needs of your unit, the intent is clear, and are not in conflict with the Louisiana and National PTA bylaws.
- If you have questions, you should contact the LAPTA Bylaws chair to review amendments **BEFORE** they are presented to the general membership.
- **Notify the membership in writing at least 30 days prior to the meeting** at which the vote will be taken to amend the bylaws: notes home, newsletters, membership e-briefs, etc., are all acceptable forms of notice.
- All proposed bylaws changes, even a proposal that the bylaws be submitted for approval **WITHOUT CHANGE** must be presented at a general membership meeting.
- To be adopted, bylaws and amendments require a two-thirds rising vote of those members present and voting.

LAPTA BYLAWS APPROVAL IS REQUIRED

Once amendments/updates to the bylaws have been approved by the general membership, you still need the approval of the LAPTA.

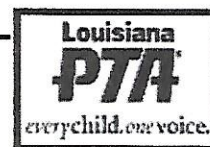
- Using the most recent template, please prepare a **complete** set of bylaws showing the recent amendments and **submit them by email** to laptabylaws@gmail.com
- **YOU MUST SUBMIT A COMPLETE SET OF BYLAWS.** This means the entire template/form must be filled in. Incomplete or partial bylaws submitted for approval will not be approved and will be returned to the local unit. This applies even for those units making a "required" update.
- You must also submit a completed **BYLAWS APPROVAL FORM** -- this form is not a template and requires signatures. You may mail it to the State Office or scan it and send it as an attachment when you submit your bylaws.
- The official bylaws template (a fill-in-the-blank form) and the Bylaws Approval form may be obtained from the state website, www.louisianapta.org, the Bylaws chair of LAPTA at laptabylaws@gmail.com or from the State Office at office@louisianapta.org

- Complete the Template by filling in the blanks or drop-downs provided. If the amendment exceeds the space allotted, please type the word ADDENDUM in the blank and then type the amendment out in its entirety in the section marked ADDENDUM. Make sure you show the Article heading and number as well as any section number.
- Bylaws are reviewed by the LAPTA Bylaws chair. If approved, they will be stamped "APPROVED" and signed by the state bylaws chair. If the chair has questions, they will contact you.
- The Date of Approval by the Louisiana PTA will be the date the chair approves them, not the date they were received or the date the local unit approved the bylaws.
- THE "APPROVED" STAMPED COPY IS THE OFFICIAL COPY. No matter how many copies you retype yourself, they are not official copies of your bylaws.
- Approved bylaws will be returned to you by PDF and the "hard" copy is maintained by Louisiana PTA at the State Office in Mandeville. Paper copies are no longer provided.
- If your unit cannot submit required forms electronically, you may mail them to the State Office at the address below; however, this will cause a delay in getting them approved.

LOUISIANA PTA
P.O. Box 4420
Covington, LA 70434
Attention: Bylaws Chair

- LAPTA requires that local units update their bylaws at least once **every three (3) years** from the date on file with LAPTA (as of 2017). Local units can amend bylaws as often as needed as long as the amendments are approved by the general membership and submitted for approval by the state bylaws chair.

2021- 2022 Bylaws Approval Form



The submission of this form and use of LAPTA bylaws template is required. Bylaws not in compliance will be returned to local unit.

Unit Name _____

LUR _____

Parish _____

Check the box that applies to your unit status.

Existing Unit

☐

Reinstated Unit

☐

New Unit

☐

The PTA's bylaws/amendments were approved at the general membership meeting held on:

(Day, Month, Year) _____

Article/sections amended _____

President _____
(Signature)

Secretary _____
(Signature)

Email bylaws and approval forms in PDF format to: laptabylaws@gmail.com (Recommended)
OR

If you cannot scan and send this form electronically, mail it with your completed bylaws to:
LOUISIANA PTA
P. O. Box 4420
Covington, LA 70434
Attention: Bylaws Chair

However, by mailing your bylaws to the State Office, approval could take longer.

Unit President's Contact Information:

Name _____

Home Phone _____

Cell Phone _____

E-mail Address _____

***bylaws will be returned via email – please print legibly and provide a working email account

State of
Louisiana
Secretary of
State



COMMERCIAL DIVISION
225.925.4704

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

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

Previous Names

Business: LOUISIANA PARENT-TEACHER ASSOCIATION

Charter Number: 00702580N

Registration Date: 5/9/1930

Domicile Address

1131 NORTH CAUSEWAY BLVD
SUITE 306
MANDEVILLE, LA 70471

Mailing Address

P O BOX 4420
COVINGTON, LA 70434

Status

Status: Active

Annual Report Status: In Good Standing

File Date: 5/9/1930

Last Report Filed: 8/19/2021

Type: Non-Profit Corporation

Registered Agent(s)

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

Officer(s)

Additional Officers: No

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

Officer:	BETH MAILHO
Title:	Secretary/Treasurer

Address 1: 1131 N. CAUSEWAY BLVD
Address 2: SUITE 306
City, State, Zip: MANDEVILLE, LA 70471

Amendments on File (4)

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

Print

Payment Confirmation: Collect Local Unit Dues July 1, 2021 - June 30, 2022

1 message

Cheddar Up <friendlysupport@cheddarup.com>
Reply-To: Do Not Reply <donotreply@cheddarup.com>
To: Kayla Pagel <president@louisianapta.org>

Wed, Sep 8, 2021 at 1:59 PM



Thank you for your payment

Louisiana PTA Receipt for Local Unit PTA Membership Dues

Collect Local Unit Dues July 1, 2021 - June 30, 2022

Sep 08, 2021

Payment by eCheck

ITEMS:

Membership dues to LAPTA

\$3.50

Qty: 1

Local Unit name and school: Louisiana Parent Teacher Association

Parish your unit is located in:: NA

Name of first officer or chairperson submitting payment : K Pagel

Email address of first officer or chairperson submitting payment : president@louisianapta.org

Name of second officer or chairperson submitting payment : Beth Maillho

Email address of second officer or chairperson submitting payment : treasurer@louisianapta.org

Total number of members that dues are being paid for:: 1

Subtotal: \$3.50

Total Amount \$3.50[View order details](#)**Questions about your payment?**

For questions related to shipping, tickets, refunds, or special requests, [contact your organizer >](#)

My E-Learning

My E-Learning

501(c)(3) Basics for Local PTAs

This course will help local PTAs navigate the revocation process with the IRS and help them maintain their 501(c)(3) status.

<http://www2.pta.org/New5013cLocalBasics>

501(c)(3) Basics For State PTAs

This course provides strategies for state PTAs to support local PTAs with the IRS revocation process and to help the local PTAs maintain their 501(c)(3) status.

<http://www2.pta.org/New5013cStateBasics>

Board Basics

Learn the basic governance structures behind most PTA units.

<http://www2.pta.org/NewBoardBasics>

Local Unit President

This course is an introduction to the roles and responsibilities of the local unit PTA president.

<http://www2.pta.org/NewPresidentLU>

Local Unit Secretary

This course is an introduction to the roles and responsibilities of the local unit PTA secretary.

<http://www2.pta.org/NewSecretary>

Local Unit Treasurer

This course is an introduction to the roles and responsibilities of the local unit PTA treasurer.

<http://www2.pta.org/NewLocalUnitTreasurer>

Planning Your PTA Year

Learn to keep volunteers motivated by putting an achievable plan together for the year.

<http://www2.pta.org/NewPlanningPTAYear>

Quick Guide to Budget Basics

This course will provide you with a short guide to specific budgetary duties and responsibilities that are needed to fulfill the requirements of a local PTA.

<http://www2.pta.org/NewQuickGuideToBudgetBasics>

Quick Guide to Taking & Approving Minutes

This course is a brief guide on how to properly take meeting notes for the Local Unit PTA Secretary.

<http://www2.pta.org/NewTaking&ApprovingMinutes>

Reflections Leader Training

Walk through a step-by-step process, gather tools and resources, and learn best practices for encouraging creativity in your school with the National PTA Reflections student arts recognition program.

<http://www2.pta.org/NewPTAReflections>

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