

LOUISIANA PTA RESOURCE GUIDE

2020 – 2021

Section 1

Local Unit information

Complete the information below and use as a reference.
If you need assistance, contact the LAPTA Office at (985) 789-9349.

Local Unit Name: _____

Local Unit Number (LUR #): _____

District/Council: _____

District/Council President: _____

School Address: _____

School City/Zip: _____

President Phone: _____

President Email: _____

TABLE OF CONTENTS

Louisiana PTA (Section 1)

State Office	2
2020 - 2021 Calendar.....	3
Unit in Good Standing.....	4
District in Good Standing	4
Board of Directors: Officers	5
Board of Directors: District/Council Presidents	6
Board of Directors: Committee Chairs	7

PTA Basics (Section 2)

Procedure Book	2
Email Protocol.....	3
Parliamentary Law	5

President's Guide (Section 3)

Introduction	2
Major Duties	2
Important Documents and Information	3
Qualities of an Effective PTA.....	4
Communication.....	4
Membership.....	5
Finances	6
Program Planning.....	7
Involving the School Community	8
Meetings, Meetings, Meetings	9
How to Handle Disruptions.....	12
School Level Complaints	14
Plan of Work.....	18
PTA Conflict of Interest Policy.....	19
Local Unit Check List	20

Secretary (Section 4)

Introduction	2
Duties.....	2
Minutes.....	3
Miscellaneous Information	7
Sample Minutes	8
Sample Motion Form... ..	9

Treasurer (Section 5)

Introduction	2
Responsibilities of the Treasurer	2
Reference Materials.....	3
Principals of PTA Financial Management.....	3

The Budget	4
Treasurer’s Notebook	7
Banking	8
Record Keeping	11
Forms	11
Reports.....	12
Upon Leaving Office	13
Audit (or Review)	14
Incorporation	16
Insurance.....	17
Federal Taxes	18
Electronic Filing Requirements	20
Sales Taxes	21
Miscellaneous	22
Additional Resources	24
Treasurer’s Checklist.....	26
Local Unit Budget Approval Form	28
Sample Forms.....	29
Sample Letters	39

Board of Directors (Section 6)

Introduction	2
Board of Directors	2
Executive Committee	3
Committees.....	4
Board Orientation	8
Setting Goals	9
How Boards Succeed...A Checklist	10

Nominating Committee and Elections (Section 7)

Nominating Committee	2
Elections.....	4
Script for Non-Contested Election	6
Script for Contested Election	7
Nominating Committee Report Form... ..	9
Teller Committee Report Form.....	10

Membership (Section 8)

Introduction	2
Goals	2
Duties of the Membership Chair... ..	3
Plan of Work.....	4
Membership Facts	5
Membership Campaign.....	5
Student Involvement	10
Calendar... ..	11
Membership Recognition.....	14
Membership Card Order Form... ..	15

Advocacy (Section 9)

Introduction2
Responsibilities of Legislative Chair2
Advocacy vs Lobbying3
Legislative Activity Guidelines..... 4
Developing an Advocacy Initiative6
Communicating with Lawmakers..... 8
Resolutions.....10
Legislative Platform..... 11
Format of a Resolution.....14
Sample Resolution15

Diversity, Inclusion, & Outreach (Section 10)

Diversity and Inclusion in PTA..... 2
How Diverse is your PTA Board 4
Personal Action Plan5
National PTA Resolution 6

Bylaws and Standing Rules (Section 11)

Bylaws 2
Updating 2
Bylaws Approval Form..... 4
Instructions for Fill-in-the-Blank Bylaws 6
Standing Rules..... 8
Sample Standing Rules 9
Articles of Incorporation 13

LOUISIANA PTA OFFICE

P.O. Box 4420
Covington, LA 70434
Phone: 985.789.9349
Email: la_office@bellsouth.net
www.louisianapta.org



All calls will be returned after 3 pm Monday – Thursday



*The Louisiana PTA office serves as a resource and support for local units, districts and the Louisiana PTA Board of Directors.
Please call if you have questions or need information.*

2020 - 2021

LOCAL UNIT INFORMATION

OCTOBER - JUNE

Leadership training conducted by local Districts

MONTHLY

Submit membership dues and new membership rosters to state

NOVEMBER 15 DEADLINE ** Extended to January 1 by LAPTA

Unit in good standing files due to district President

FEBRUARY 1 DEADLINE

Reflections entries from district boards due to LAPTA 3rd VP Programs

MARCH 1 DEADLINE

LAPTA Grant applications due to the LAPTA President

MARCH 1 DEADLINE

Nominations for 2021-2023 LAPTA State Executive Officers (President, 1st VP Advocacy, and 2nd VP Membership) -- email nominations to LAPTA State Office

Will not be conducted in the 2020- 2021 School Year

Educator of Distinction Award

Will not be conducted in the 2020 - 2021 School Year

Outstanding Newsletter Award and Outstanding Website Award

Will not be conducted in the 2020 -2021 School Year

Advocacy Award

May TBD

State Conference via Zoom, Voting and By-Law Amendments

JUNE 24 – 27

2021 National PTA Convention and Expo, Grapevine, Texas

UNIT IN GOOD STANDING

A local PTA in good standing is one that:

- 1) adheres to the Purposes and basic policies of the PTA;
- 2) remits the national portion of the dues through the state PTA to reach the national office by dates designated by the National PTA;
- 3) has approved bylaws on file in the Louisiana PTA office. Bylaws must be approved by the State Bylaws Committee Chair at least once every three (3) years.
- 4) has a current year's budget verified by a Local Unit Budget Approval form signed by the local president, treasurer and principal; and submitted to the applicable District PTA Board of Directors. In the instance that the unit is a community or non-traditional PTA, another member may sign in place of the principal.
- 5) has been assigned its own Employer Identification Number (EIN/Tax Identification Number) from the I.R.S. A copy of the confirmation letter with the Employer Identification Number (EIN/Tax Identification Number) must be forwarded to the Louisiana PTA office.
- 6) must purchase a PTA membership for every paying member. Each unit must submit membership dues for a minimum of thirty (30) members per year.
- 7) must file the IRS 990 and adding proof to local unit checklist packet
- 8) submit the previous fiscal year's audit committee report

To enter programs, apply for awards and send voting delegates to state convention:

- 1) Entries to all recognitions and awards for the Louisiana PTA and National PTA will be ineligible unless the criteria for a unit in good standing has been met by the district and state deadlines, whichever comes first.
- 2) All local PTA units must meet the criteria for a unit in good standing by March 15th of each year to send voting delegates to the Louisiana PTA state convention.

DISTRICT IN GOOD STANDING

A district PTA in good standing is one which:

- 1) adheres to the Purposes and basic policies of the PTA;
- 2) remits the national and state portions of the local unit dues to the Louisiana PTA at least bi-monthly;
- 3) has approved bylaws on file in the Louisiana PTA office. Bylaws must be approved by the Bylaws Chair or State Secretary at least once every three (3) years;
- 4) submits to the Louisiana PTA office by November 1st a current year's budget verified by a budget approval form signed by the president, treasurer, and one other officer;
- 5) has been assigned its own Employer Identification Number (EIN/ Tax Identification Number) from the I.R.S. and has reported the number to the Louisiana PTA office;
- 6) has a minimum of two hundred ten (210) cards purchased by local units during the membership year;
- 7) submits to the Louisiana PTA office by November 1st a copy of its previous fiscal year's audit report;
- 8) submits to the Louisiana PTA office by August 1st the names and contact information for district officers and committee chairs and updates as necessary;
- 9) submits to the Louisiana PTA office by November 1st the names and contact information for local unit presidents and updates as necessary; and
- 10) provides local unit training.
- 11) Has at least five (5) local units in good standing in their district.

A district meeting these requirements:

- 1) will be eligible to receive all state recognitions and awards.
- 2) will receive distribution of dues.

**BOARD OF
DIRECTORS
2020-2021 OFFICERS**

PRESIDENT

Shannon Howard
471 Libuse Cutoff Rd
Pineville, LA
Email:
president@louisianapta.org

1ST VP ADVOCACY

Buffie Singletary
35202 Herman Singletary Rd
Pearl River, LA 70452
Email:
laptalegislation@gmail.com

2nd VP Membership

VACANT
Email:
president@louisianapta.org

3rd VP PROGRAMS

Sarah Ladner
P.O. Box 8232
Shreveport, LA 71148
Email:
laptaprograms@gmail.com

SECRETARY

VACANT
Email:
president@louisianapta.org

TREASURER

Kayla Pagel
944 Winona Drive
Mandeville, LA 70471
Email:
laptatreasurer@gmail.com

**DISTRICT PRESIDENTS
2020 - 2021**

CADDO

**Sarah Ladner
P.O. Box 8232
Shreveport, LA 71148
Email: caddodistrictptaprograms@gmail.com**

ST. TAMMANY

**Kayla Pagel
944 Winona Drive
Mandeville, LA 70471
Email: president@sttammanypta.org**

COMMITTEE CHAIRS

BYLAWS
VACANT

PUBLIC RELATIONS
VACANT

LEADERSHIP DEVELOPMENT
VACANT

SPECIAL AWARDS
VACANT