



# PTA Leadership Training Membership

Hosted by Louisiana PTA

[LouisianaPTA.org/membership](https://LouisianaPTA.org/membership)

[Membership@LouisianaPTA.org](mailto:Membership@LouisianaPTA.org)

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## Why are we here? Why do you PTA?

**To make every child's potential a reality  
by engaging and empowering families and communities  
to advocate for all children.**

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### Objectives today:

- Become aware of LAPTA Officer and Unit requirements
- Review the duties of the Membership VP/Chair and committee members
- Learn about Membership Campaigns
- Define the Value of PTA – how to create a PTA Value Message
- Learn about the LAPTA Monthly Membership Challenges and Annual Awards
- Become aware of the LAPTA Communications and Social Media Guidance memo

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### Where to start? With Sign-Ups & Downloads

- Register at [LouisianaPTA.org/submit-officer-data-1](https://LouisianaPTA.org/submit-officer-data-1). This is required and will allow you to receive LAPTA emails and e-newsletters.
- Visit [LouisianaPTA.org/membership](https://LouisianaPTA.org/membership)
- Download the **LAPTA Toolkit: Membership Sec 6**. The Toolkit contains information on your job
- Create an account at [PTA.org](https://PTA.org) and **create an account**. There is lots of information plus e-Learning and “Thrive” educational videos.
- Reminder: all officers need to be **PTA members** of their Local PTA Units -- this also makes you a LAPTA and National PTA member.

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## Why do membership numbers matter?

- A growing and engaged membership is the foundation for achieving PTA's mission to make every child's potential a reality.
- PTA stands for every child, one voice. Members represent and speak for every child.
- Growing membership is the responsibility of everyone on your board.
- There is strength in numbers – one person CAN make a difference and a room full of people can make CHANGES!

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## Basic Roles and responsibilities of the Membership VP/Chair

- You are a member of the Executive Committee (if a VP) and/or the Board of Directors.
- Your basic duties are defined in the LAPTA Membership Toolkit, Section 6, page 10.
- Your additional duties may be designated in your unit standing rules.
- You chair the committee to help plan, recruit, and recognize members.
- You are familiar with and use the National PTA Membership Campaigns and Messaging tools available at <https://www.pta.org/home/run-your-pta/membership-resourcespta.org>

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## Roles and Responsibilities, cont'd:

- You regularly submit dues and membership rosters at <https://www.louisianapta.org/submit-dues> encourage your unit to participate in the LAPTA membership contests
- You provide the Executive Committee the most current membership roster monthly.
- You provide repeated opportunities for people to join your PTA throughout the year.
- You thank all your members for joining.
- You celebrate your membership successes!

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## Membership Dues - What Do They Provide

PTA dues directly support your child.

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.

All PTA leaders and members are volunteers, from the individual school unit up to the national level. The dues you remit from your PTA go to pay for shared statewide and national resources (program development, social media, websites, printed materials, training events, etc.), operational expenses, and reimbursements for travel expenses to trainings and to participate in conferences to benefit the association.

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## Submitting Membership Dues

- The first step to processing memberships is to go to LouisianaPTA.org/submit-dues.
- Click "PAYMENT LINK" which brings you to CheddarUp.com. The system will accept an eCheck.
- Submit the number of individual memberships collected by the PTA. The cost is \$3.50 each. Local Units must have a minimum of 30 members to maintain Active Affiliation with LAPTA each year.
- The exact number of memberships collected from your members must be submitted. It is important to properly account for all members. National PTA collects the dues portion of \$2.25 per member dependent on the membership numbers submitted by LAPTA by the 5<sup>th</sup> of each month.



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## Submitting Membership Reports

- 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 right.
- 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**.
- Repeat the process above monthly. Memberships are good for one year, expiring on June 30.
- Send out a thank you note to all members by email or paper note at least monthly.
- Include LouisianaPTA.org and PTA.org in your correspondence for members to check out.

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:	Your PTA's Membership Goal:	
Parish:	Total Memberships Year to Date:	
Your Name:	New Memberships for this Report:	
Your Email:		
Member Last Name	First Name	Email Address
Last	First	Email
Last	First	Email
Last	First	Email
Last	First	Email

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## Active Affiliation

All local units in Louisiana have mandatory annual requirements that need to be documented and submitted to LAPTA in order to continue operating as a PTA through the Active Affiliation Files.

A unit must be in "Active Affiliation" to be eligible for awards, grants, contests, and student participation in LAPTA and National PTA judged programs like Reflections.

Membership dues are a requirement of Active Affiliation. As the Membership VP/Chair you are responsible for ensuring membership dues are submitted

Go to <https://www.louisianapta.org/activeaffiliation> for more information on Active Affiliation and to review the submission process

**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://forms.ptaform.com/2218113029505> or scan the QR Code. PTAs that do not maintain Active Affiliation will be subject to the Local PTA Separation Plan.

Required Forms are:

- 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.
- 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://forms.ptaform.com/2218113029505>.
- BUDGET:** Submit the first page of Budget showing the LAPTA approval stamp and approval date. Budgets must be updated every three years with the LAPTA Bylaws Template. Visit LouisianaPTA.org/bylaws.
- TAXES:** Submit proof of 2020 filed and accepted IRS Form 990 tax filing.
- BUDGET:** Submit the Local Budget Approval Form and the Approved Annual Budget.
- AUDIT REPORT:** Submit the Audit Committee Report for the previous year.
- ARTICLES OF INCORPORATION:** Submit the updated Annual Report of the Articles of Incorporation from Louisiana Secretary of State at [sos.louisiana.gov](https://sos.louisiana.gov).
- INSURANCE:** Submit the insurance declaration page, if applicable. This will be required for 2023-24 year.
- TRAINING:** Submit proof of PTA Leadership Training for all officers at either the LAPTA Leadership Training or LAPTA Individualized Training. Certificates will be issued.

If the Active Affiliation Report is not submitted by the yearly deadline, then the Local PTA Retention Plan will be initiated. The first phase of the Retention Plan is Notification Phase. Notification Phase, Notification Phase, Notification Phase, and Notification Phase. If a PTA is in compliance, complete the Job of Action Form at <https://forms.ptaform.com/2218113029505>. For Local Units that have not filed taxes for at least three years yet work to reinstate their PTA, complete the Reinstating an Existing PTA Packet.

Questions? Email LAPTA at [affili@LouisianaPTA.org](mailto:affili@LouisianaPTA.org).

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## So, Let's Grow our PTA Family

- Do you know the number one reason why people say that they haven't yet joined PTA?  
*They were never asked to join!*
- You know the good work that your PTA does for your community every day but talking about that good work and asking others to join can be hard.
- National PTA has provided tools and resources to help make your work easier.
- The membership campaign—**PTA For Your Child**—is designed to engage and excite new members and existing members by making the work of the PTA more visible and highlighting the value and impact of PTA.

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## Let's Check out the "PTA For Your Child" Campaign

- <https://youtu.be/vG74RpvbGas>
- Membership Campaign materials include:
  - Downloadable Toolkit
  - Written communications to help facilitate your campaign
  - Lots of campaign visuals in English and Spanish that you can customize
  - Online training at <https://www.pta.org/home/run-your-pta/membership-resources/membership-campaign>




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# YOU BELONG IN PTA

UNITE SPEAK ADVOCATE CHAMPION CONNECT INVEST

- Let National PTA show you how to start a conversation with anyone to let them know why they should join your PTA
- The Reasons YOU Belong Value message tools include:
  - The Guide: Five Easy Steps
  - Social Media Graphics
  - Print & Go Flyers
  - Customizable Content Flyers



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- Let the Guide help you to create a PTA Value Message
  - Understand your audience and their needs
  - Review the three high value areas as a starting point
    - Value 1: Our PTA/PTSA creates connections
    - Value 2: Our PTA/PTSA supports your child
    - Value 3: Our PTA/PTSA amplifies your voice
- Identify your audience – which Value item appeals most to them?
  - Answer three key questions
    - Why join PTA/PTSA?
    - In what way does PTA help me?
    - How do those ways benefit me and my child?

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## YOU BELONG IN PTA

UNITE SPEAK ADVOCATE CHAMPION CONNECT INVEST

### How to Create Your Own PTA/PTSA Value Message

You know the good work that your PTA does for your community every day—but talking about your accomplishments and inviting others to join you can be hard. This document will walk you through the steps you'll need to follow to successfully ask anyone to join your PTA/PTSA.

**Getting Started: Understanding Your Audience and Their Needs**

There's no one size fits all way to talk about the value your PTA/PTSA brings, but according to research from our award-winning [Storybook Campaign](#), there are a few key tips:

- 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.

You are going to use the following three high-value areas as a starting point to create custom value message for the different audiences your PTA/PTSA wants to recruit.

**Value 1: Our PTA/PTSA Creates Connections**

May appeal most to those who are seeking to develop relationships and be "in the know" with what's happening in school or in the community at large. Consider referencing this value area when asking business leaders or new families at your school to join your PTA/PTSA.

**Value 2: Our PTA/PTSA Supports Your Child**

May appeal most to those who are always looking to discover new ways to support their children. Consider referencing this value area when asking administrators, teachers and parents/guardians who are not yet members to join your PTA/PTSA.

**Value 3: Our PTA/PTSA Amplifies Your Voice**

May appeal most to those who seek to affect policies and practices that impact the education, safety and well-being of children and youth. Consider referencing this value area when asking anyone, including students or community advocates, to join your PTA/PTSA.

Page 12 Create Your Own Value Message  
PTA FOR YOUR CHILD | PTA.org/JOIN

When planning your membership recruitment efforts, keep this slogan in mind:

PTA believes that together we can make every child's potential a reality—but we need more believers like YOU. We need YOU. Will you join us?

You can find the guide and everything you need at:

<https://www.pta.org/home/run-your-pta/membership-resources/reasons-you-belong>

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### LAPTA Monthly Membership Challenges

- LAPTA has a goal of 12,100 members for our 100<sup>th</sup> 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

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### LAPTA Monthly Membership Challenges, cont'd:

**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



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### LAPTA Annual Membership Awards

Annual membership awards will be announced at the General Membership Meeting on March 25, 2023. Membership rosters must be submitted by March 15 to office@LouisianaPTA.org in order to compete. Go to <https://www.louisianapta.org/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



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### Membership Binder

Create a Membership Binder. Suggested sections:


- Tab 1: Summary of PTA accounts and passwords and the Board roster.
- Tab 2: LAPTA Toolkit: Membership, Section 6, plus sections 1 (Office & PTA Basics), 5 (Board of Directors), and 10 (Bylaws, Standing Rules & Articles of Incorporation)
- Tab 3: Membership Reports and Rosters spreadsheets, reports, notes, email campaigns, Welcome Packet, and other membership materials
- Tab 4: Agendas and 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

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## Communications & Social Media

More assistance is available at:  
<https://www.pta.org/local-leader-kit/communications>

National PTA shares tips and best practices to effectively share messages with fellow PTA members, school staff and administrators, community members, and the 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 non-commercial, nonpartisan, 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 effective. 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 to others. Comments are sent to all 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, receive their consent to re-post and properly cite the source or provide a link to the original content.

**All in insurance offers additional coverage for Media Liability to cover online liability.**  
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## Communications & Social Media

Communicate to share the good work of PTA

- Newsletters
- Website
- Social media platforms



**Remember, You Are Representing the PTA**

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonpartisan 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.
- Adhere to copyright laws and regulations and art in an ethical manner.
- Do not include photographs 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, nonpartisan, and nonpartisan according to PTA policies.
- Have at least two administrators for each site.
- Posts should be PTA-related such as fairs, events, grants, PTA and school deadlines, and other information valuable to PTA members.
- Keep information correct.
- 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.

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## Review - today you have covered:

- LAPTA Officer and Unit requirements
- Basic roles and responsibilities of a Membership VP/Chair
- Been introduced to National PTAs Membership Tools and Resources
- Reviewed the LAPTA Dues Submission Process and Membership Reporting Requirements
- The LAPTA Monthly Membership Challenges and Annual Awards
- The LAPTA Communications and Social Media Guidance memo

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## Any questions?



Membership  
 2022 - 2023  
 Section 6

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**One Last thing**

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**LAPTA is in search of a Membership VP  
to serve on the Board of Directors**

Apply here!



Email us at [president@louisianapta.org](mailto:president@louisianapta.org) if you are interested  
in learning more about volunteering at the state level

[LouisianaPTA.org/membership](https://LouisianaPTA.org/membership)