

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

Every year, local PTAs are required to submit documentation to achieve Active Affiliation Status with both Louisiana PTA and National PTA. "Active Affiliation" signifies that the Local PTA Unit is up to date with its responsibilities to preserve its IRS status and its affiliation with Louisiana and National PTA. The Active Affiliation Report consists of nine items which are uploaded at LouisianaPTA.org/affiliation or by scanning the QR Code. Local PTA Units failing to maintain Active Affiliation will be subject to the Retention Plan. The deadline for submitting these files is October 31, 2024.



DUE OCTOBER 31, 2024

The following items are individually uploaded into the corresponding field. Please do not combine files. See further information at LouisianaPTA.org/affiliation.

1. MEMBERSHIP: Submit proof of paid dues which are paid to LAPTA at LouisianaPTA.org/membership.
2. LEADER REGISTRATION: Register all Board Members at LouisianaPTA.org/register. Officers are required.
3. BYLAWS: Submit the first page of the Bylaws with the LAPTA approval stamp.
4. TAXES: Submit proof of 2022 or 2023 filed and accepted IRS Form 990 tax filing.
5. BUDGET: Submit the 1) Local Budget Approval Form **and** 2) the approved Annual Budget.
6. AUDIT REPORT: Submit the Audit Committee Report for the previous year.
7. ARTICLES OF INCORPORATION: Submit the updated Articles of Incorporation from geauxbiz.com.
8. INSURANCE: Submit the insurance declaration page.
9. TRAINING: Submit proof of training for officers from LAPTA training or see LouisianaPTA.org/training.

RETENTION PLAN

If a Local PTA Unit fails to submit the Active Affiliation Packet by the annual deadline, LAPTA will initiate the Retention Plan to guide units back to compliance. Maintaining open communication with LAPTA is crucial to facilitate the PTA's return to Active Affiliation status. For inquiries, email Affiliation@LouisianaPTA.org. The Retention Plan has five phases:

1. **Notification:** LAPTA notifies the PTA of the missed deadline and grants a 30-day grace period to submit the missing items.
2. **Restriction:** During a second 30-day period, the Local Unit must submit the outstanding items. Additionally, the unit will be ineligible for awards, programs, or grants administered by LAPTA or National PTA.
3. **Intervention:** The PTA will collaborate with LAPTA to establish a Plan of Action, specifying new deadlines for resolving the outstanding issues.
4. **Restructure:** Should the PTA fail to complete the required report, LAPTA may consider restructuring the PTA's leadership or advancing to the Dissolution Phase early.
5. **Dissolution:** A Local Unit's charter may be revoked and their LAPTA associated IRS 501(c)(3) nonprofit status may be forfeited under certain conditions, which include failing to achieve Active Affiliation for three consecutive years, refusing to implement the Plan of Action as agreed upon, or non-compliance with the Purposes and Principles of PTA outlined in the Bylaws adopted in May 2024 (Articles II and III). In such cases, the PTA must discontinue using the PTA name and close its bank accounts, with any remaining funds to be donated to another PTA.

Visit LouisianaPTA.org/affiliation for details.