

DISSOLUTION OF A LOCAL PTA UNIT

Local PTA Units may dissolve and close their association with Louisiana PTA and National PTA. The PTA's General Membership and its community are given an opportunity to express their opinions and decide by vote to dissolve or not. Parliamentary procedures must be followed to protect the members and comply with federal nonprofit 501(c)(3) regulations. Dissolving PTA Units is LAPTA's responsibility and it must be included in the process.

A PTA Unit is subject to termination and withdrawal of its charter by LAPTA for reasons such as: its General Membership votes to dissolve; noncompliance of affiliation requirements; violation of the Bylaws; or, for other causes, actions, or behaviors declared by LAPTA.

STEP 1: Contact LAPTA President at president@louisianapta.org to discuss the situation and receive guidance on how to proceed. Complete *Request to Dissolve an Existing PTA* online at <https://form.jotform.com/221998662679074> or scan the QR Code.



STEP 2: Move to Dissolution

OPTION 1: If the Local PTA Unit does not have active members who can vote to dissolve, then LAPTA conducts the vote among its Board of Directors with notice following the Bylaws guidance.

OPTION 2: If a PTA has active members with voting rights from the current fiscal year, then the PTA follows the steps listed in the Bylaws for legally closing a unit in compliance with the IRS.

1. **Board Meeting:** The Local PTA Board of Directors adopts by a two-thirds vote to recommend that dissolution of the PTA be submitted to a vote at a General Membership Meeting.
2. **Notice to Members:** Written notice for the General Membership Meeting includes intent to dissolve the local PTA is given to each voting member with 20 days' notice prior to the meeting. **Notice to LAPTA:** Written minutes of the Board of Director's meeting with recommendation to dissolve *and* the written notice for the General Membership Meeting are given to the LAPTA President with 20 days' notice prior to the General Membership Meeting.
3. **General Membership Meeting:** An affirmative two-thirds vote of members present and entitled to vote at the meeting need to approve dissolution of the PTA. Only those who submitted dues to the local PTA prior to the date of initial recommendation by the Board of Directors and continue to be members on the date of the meeting may vote. Written minutes with results of the meeting are immediately shared with LAPTA.

STEP 3: Charter Withdrawal

Upon withdrawal of its charter, the PTA is obligated to promptly carry out all proceedings necessary for dissolving the PTA under the supervision and direction of LAPTA. Further, it shall:

1. Surrender all of its books and records to LAPTA and surrender its assets and property to LAPTA or to another local PTA affiliated with LAPTA in accordance with Federal 501(c)(3) regulations.
2. Give LAPTA access to all PTA technology accounts such as Facebook, bank accounts, and more.
3. Cease and desist from the further use of any name that implies or connotes association with the National PTA or LAPTA or status as a constituent association of the National PTA.



DISSOLVE OF A LOCAL PTA UNIT



Louisiana PTA (LAPTA) is responsible for overseeing the dissolution of a PTA and shall be included in the process. Complete the form online at <https://form.jotform.com/221998662679074> or scan the QR Code. Use this form throughout the process for each step.

Step 1:

PTA Name: _____ Assisting LAPTA Officer: _____
 School Name: _____ School Parish: _____
 Your Name: _____ PTA Board Position, if applicable: _____
 Your Phone: _____ Email: _____
 School Contact Name and Position: _____
 School Contact Phone: _____ Email: _____
 When were the federal taxes last filed? _____
 What is the tax filing site and login? _____
 What is the bank name? _____
 What is the bank login? _____
 How much money remains in the PTA bank account? _____
 Do you have the checkbook? _____ Who are the authorized bank signers? _____

 What is the contact information for the bank signers? _____

 Is there any other helpful information? _____

 After speaking with LAPTA, where will the remaining money go? _____

Step 2: Move to Dissolve.

Conducted by ___ Local PTA Unit or ___ LAPTA Board of Directors
 _____ Date Board of Directors voted to submit dissolution to the General Membership
 _____ Date written notice was given to the General Membership of Meeting
 _____ Date Board of Directors' minutes and Meeting notice given to LAPTA
 _____ Date of Meeting. Was dissolution affirmed? _____
 _____ Date Minutes from Special Meeting were provided to LAPTA
 Choose one: ___ Voluntary Dissolution without Prejudice or ___ Charter Withdrawal by LAPTA

Step 3: Charter Withdrawal

_____ Does the above PTA agree to cease and desist from further use of any name that implies association with the National PTA or LAPTA in all its forms?
 _____ Date former PTA turned over its books and records to LAPTA
 _____ Date assets and property were transferred to LAPTA or to _____ PTA
 _____ Amount of assets transferred. Attach report of transferred property.