**REACTIVATION OF**

**AN EXISTING PTA**

Louisiana PTA (LAPTA) assists with reactivation of existing PTA units who are an independent nonprofit, established in accordance with state and federal laws, and are affiliated with LAPTA and National PTA. The process is unique for each unit, but these are the general steps to take.

# Step 1: Go to <https://form.jotform.com/222187872616160> or scan the QR Code to complete Step 1: Reactivating an Existing PTA to reactivate a Local Unit. A LAPTA Board of Directors will meet with your group and walk through the steps to apply for affiliation. LAPTA will either reassign the old LUR# (Local Unit Registration) or assign a new LUR later. LAPTA decides to appoint officers or if elections shall be held.

# Step 2: Form a Planning Committee. Identify parents, school administration, teachers, and community members interested in forming a PTA. Set a time and place for an initial planning meeting and invite the interested parties. Virtual meetings and elections are allowed. At the Planning Committee meeting, first select a Chair and a Secretary of the Planning Committee if officers were not appointed. Second, organize the Bylaws Committee. Bylaws define the primary characteristics of the PTA. LAPTA requires the use of the customizable Bylaws template at LouisianaPTA.org/bylaws. Third, if officers were not appointed, organize the Nominating Committee to seeks qualified nominees for each office as outlined in the proposed Bylaws. Survey your school community to find individuals willing to be nominated for office. All candidates must intend to join the PTA.

# Step 3: Reactivation Meeting.

1. **Set a date and publicize** the Reactivation Meeting. Distribute notices of the organizational meeting to all parents, teachers, school staff, and community members. Include the proposed Membership dues in the note and that a minimum of 30 people is required to join and pay dues *during* the meeting.
2. **Call the meeting to order.** Distribute the agenda.The appointed President or Planning Committee chair explains the purpose of the meeting and introduces the speakers who explain the policies and purposes of the PTA. These speakers should include a representative of LAPTA. A meeting to reactivate a PTA is a special event. Those present will vote in favor of or against the reformation of the PTA at the school. Have the Planning Committee Secretary take the minutes of the meeting. See *Reactivation Meeting Script,* the *Motion Form,* and the *Nominating Committee Report* at the end of this packet.
3. **Move to reactivate**. The Chair calls for a motion to reactivate the local PTA. The PTA is established when the motion is made, receives a second, and is carried by a majority vote by voice.
4. **Distribute and present Bylaws.** Share the Bylaws printed or use a projector. A Bylaws Committee member reads the proposed Bylaws and calls special attention to the customized sections. Each article is read individually so that amendments, if any, can be considered and acted on immediately. A verbal majority vote is required for adoption. A final motion is made to adopt the completed Bylaws as customized and amended.
5. **Hold a short intermission and enroll members.** A minimum of thirty members is required for a Local PTA Unit. A person becomes a member upon payment of dues. The amount is decided during the adoption of the Bylaws. Payment may be cash or paid at a temporary CheddarUp.com account by LAPTA. An accurate list of members with their contact information must be kept. Use the spreadsheet at Louisianapta.org/membership. The money collected shall be held in a school safe until a bank account is opened. See the *Sample Membership Form* at the end of this packet.
6. **If officers were not appointed, call for Nominating Committee Report and nominations from the floor**. The Chair reconvenes the meeting for nominations and elections. All candidates nominated must be members of the PTA and their consent must be obtained before their names are submitted for nominations. The election shall be by ballot, unless there is only one nominee, in which case the election may be by voice.

Officers should be voted on one by one. Only members may vote. A minimum of three officers is required.

Install newly elected officers.LAPTA representative may perform the installation, if available.

1. **The newly elected President takes the chair** and calls for further business. Ask for volunteers for the Budget Committee to help set the new budget. President appoints at least three authorized bank signers, appoints the budget Committee members, and sets the date for the next General Membership meeting. Adjourn meeting. In the meeting minutes, include the authorized bank signers’ names and slate of officers. The bank requires this document to allow signers on the account.
2. **Submit the Reactivation Meeting Results** at <https://form.jotform.com/222187872616160>or scan the QR Codeafter the meeting concludes and attach the required documents. **Email the Bylaws** approved by the membership to Bylaws@LouisianaPTA.org with the *Bylaws and Amendments Approval Form*.

**Step 4.** **Applications.** **Apply for a new EIN number** online with the IRS using a different name than the previous PTA. The PTA fiscal year runs July 1 – June 30. Your unit will be placed under Louisiana PTA group tax exemption. Email your EIN to LAPTA at office@LouisianaPTA.org. See *Applying for an IRS EIN* at the end of this packet. **Apply for Articles of Incorporation** at the Louisiana Secretary of State at *geauxbiz.com*. Initial cost is $75. Email your Articles of Incorporation to office@LouisianaPTA.org. See directions at the end of this packet. **Establish the checking account.** If there is an existing bank account, contact the bank for their requirements to update the authorized signers. Get copies of all past bank statements if possible. If there is not a bank account, ask the bank for their specific requirements to open an account. There shall be at least three authorized signers who must also be elected officers. Debit cards may be ordered by the authorized signers including the PTA name on the card. Online banking and E-Commerce are allowed. Deposit the member dues into the bank account. See *LAPTA Toolkit: Treasurer* for banking details.

**Step 5: Executive Committee meets** to set goals, develop a proposed budget with Budget Committee, select committee chairs, plan membership drives, and establish communication tools to be used with the membership and within the Board of Directors**.** The Executive Committee members are identified in the Bylaws. See *Sample Budget* at the end of this packet. **Participate in officer and committee training with LAPTA or PTA.org**. All Board members shall create an account with PTA.org. Under *Run Your PTA* menu, select *E-Learning* for further training. **Have all Board members register** with LAPTA at LouisianaPTA.org/submit-officer-data-1 once you have received your LUR number. Create email accounts for all Board members specific to the PTA such as president.ABCPTA@gmail.com. Start a GroupMe or Band App group communication with the Board. **Obtain insurance for general liability and bonding.** LAPTA and National PTA have a relationship with AIM Insurance which can be contacted at (800) 876-4044 or AIM-companies.com. Annual cost starts at $220.

**Step 6.** **Conduct a General Membership meeting**. The General Membership shall approve the proposed budget. Share the planned programs, events, and goals of the PTA. See *LAPTA Toolkit: President* for suggested scripts for budget approval and more. See *Budget Approval Form* in the Packet.

**Step 7: Submit results from steps 4 – 6** at<https://form.jotform.com/222187872616160>or scan the QR Codeto receive your PTA Charter paperwork and LUR# (Local Unit Registration number).

**Step 8. Plan your programs and projects.** PTA.org is an excellent source of information and programs for the community. Coordinate plans with the principal. Remember to advocate for every child in your school! **Celebrate!** **And Welcome to National PTA and Louisiana PTA!**

******STEP 1: REACTIVATING**

**AN EXISTING PTA**

Louisiana PTA (LAPTA) and National PTA welcome you back! To reactivate an existing PTA, submit the following information online at <https://form.jotform.com/222187872616160> or scan the QR Code.

The information needed is name of contact, phone, and email; name of school associated with the PTA, grades at the school, school address, and school contact’s name, phone, and email; full name of the previous PTA; and any information known about the previous PTA such as when were the taxes last filed, names of the last officers, is there an open bank account, etc.?

**STEP 3: AFTER THE REACTIVATION MEETING**

After completing steps 2 and 3, go to <https://form.jotform.com/222187872616160> or scan the QR Code to submit the following information.

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PTA hereby applies to reactivate membership to the Louisiana Congress of Parent Teacher Association (Louisiana PTA or LAPTA.)

Other information needed is President’s information, the PTA’s permanent address, Membership Roster Spreadsheet for paid members, Nominating Committee Report if officers were elected, Board of Directors Roster including name, email, and phone numbers, Reactivation Meeting minutes signed by presiding Chair, Secretary, or Principal. The Bylaws and its approval form are emailed to bylaws@LouisianaPTA.org.

**Step 7: AFTER THE GENERAL MEMBERSHIP MEETING**

After completing steps 4 through 6, go to <https://form.jotform.com/222187872616160> or scan the QR Code to submit the following information. Once the information is received, please give LAPTA ample time to process your charter.

The information needed is the PTA’s complete legal name, PTA LUR#, President’s information, the Budget Approval Form and the Budget, General Membership meeting minutes signed by presiding Chair, Secretary, or principal, EIN Confirmation Letter, Articles of Incorporation from Louisiana Secretary of State, bank information, Insurance Declaration page, updated Board of Directors Roster, and confirmation of submitted membership dues for at least 30 members.

**Congratulations! You’re officially a PTA!**

**SAMPLE REACTIVATION MEETING AGENDA**

**(PTA Name)**

**Reactivation Meeting Agenda**

**(Location)**

**(Date, Time)**

**Opening**

* Call to Order
* Read PTA Mission Statement: The Mission of PTA is to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.
* Introductions of Special Guests

**Move to Reactivate:** The Chair calls for a motion to reactivate the local PTA. The PTA is officially established when the motion is made, receives a second, and is carried by a majority vote by voice.

**Bylaws:** The Bylaws Committee shall have the proposed Bylaws prepared before the meeting.

* Reading of Bylaws
* Adoption of Bylaws

**Intermission** (Omit if officers were appointed)

* Refreshments
* Collection of PTA membership dues. See sample Membership Form at the end of this packet.

**Reconvene and Call to Order** (Omit if officers were appointed)

**Officers** (Omit if officers were appointed)

* Nominating Committee Report
* Call for Nominations from the floor
* Nominating Committee Report
* Election of Officers
* Installation of Officers

**New Business**

* Announcement of first General Membership meeting date and time
* Appointment of Authorized Bank Signers
* Appointment of Budget Committee
* Other

**Adjourn**

**REACTIVATION MEETING**

**SCRIPT**

This optional script is for the Reactivation Meeting in Step 3 and follows the meeting agenda. The Secretary shall take the minutes for the meeting. Use the formsat the end of this section.

**Opening**: The appointed President or chair of Planning Committee chairs the meeting, rises, and speaks, “Thank you everyone for attending the Reactivation Meeting for the ABC PTA. The purpose of this meeting is to approve the Bylaws, elect the Executive Officers (if not appointed), and get at least thirty paid memberships from you. I’d like to introduce the Louisiana PTA officer(s) who are here to assist us…. The reason why we are here reactivating the PTA is to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.”

**Move to organize**: “Our first order of business is for a motion to reactivate the PTA. Is there anyone who would make that motion to reactivate the PTA? (pause) Please state your name. And do I have a second from anyone else? (pause) Is there any discussion for or against this motion? (pause) We are now ready to vote. [Name] has moved to reactivate the ABC PTA. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’ (pause) The ayes have it, and the motion passed. Great! Now we will approve the proposed Bylaws.”

**Distribute and present Bylaws.** “TheBylaws are [posted, displayed, printed, etc.] for you to follow along. The chair of the Bylaws Committee, [name], will read the proposed Bylaws, bringing attention to the customized parts. After each article, we will vote to accept or amend that article.” Bylaws Chair stands and reads each article of the Bylaws. After each article, ask for any amendments, if any, to be considered, discussed, and voted on immediately. A verbal vote is required. Continue through all articles of the Bylaws. President or chair of Planning Committee resumes: “Now that we have gone through the Bylaws and voted on all customized articles and made amendments, could someone make a motion to accept the proposed Bylaws. (pause) Please state your name. And do I have a second from anyone else? (pause) Is there any discussion for or against this motion? (pause) We are ready to vote. [Name] has moved to accept the proposed Bylaws. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’ (pause) The ayes have it, and the motion passed. We have Bylaws!”

**If officers were appointed,** the chair says, “As President, I appoint three authorized bank signers who shall be... We also need to create a Budget Committee. Would anyone like to volunteer for the Budget Committee? (pause). The Budget Committee shall be… Will [one of the three names] serve as the committee chair? (pause for confirmation) Thank you. The date for the General Membership meeting is [date]. The final business for the meeting is to acquire at least 30 paid memberships immediately after the meeting adjourns. A membership in the ABC PTA also gives you membership in Louisiana PTA and National PTA. As the Bylaws state, our dues are [state amounts] which can be paid with cash or online at .CheddarUp.com. We have membership forms at [location] for you to complete if you pay with cash. Thank you so much for your support! See you at our next meeting on [date]! Meeting adjourned.” See the *Sample Membership Form* at the end of this packet. The President submits information following the meeting online at <https://form.jotform.com/222187872616160>.

**If holding elections, have an intermission for memberships: “**We will now have a short intermission in which we will solicit new memberships. We need a minimum of 30 paid members. As the Bylaws state, our dues are [amounts] which can be paid with cash or paid online at [ ].CheddarUp.com. We have membership forms at [location]. We will reconvene in 10 – 15 minutes.” See the *Sample Membership Form* at the end of this packet.

Reconvene for elections. Chair: “We will now reconvene our meeting. We currently have [number] paid members. Thank you for supporting our PTA! (If you have less than thirty members, work to get more members later. Announce at the meeting that you still need more members as new memberships are open throughout the year.) Our next order of business (if officers were not appointed) is the Nomination of Officers and elections. The chair of the Nominating Committee will now read their report.” Chair of Nominating Committee rises and reads, “The Nominating Committee recommends the following slate of officers: for President, [name], for (continue through all positions).” The chair hands the report to the Chair.

Chair of Planning Committee: “For President, [name] has been nominated. Are there further nominations for President from the floor? (*pause*) Hearing none, nominations are closed. For Vice-President, [name] has been nominated. Are there further nominations for Vice-President from the floor? (*pause*) Hearing none, nominations are closed. For Treasurer, [name] has been nominated by the Nominating Committee. Are there further nominations for Treasurer from the floor? (*pause*) Hearing none, nominations are closed. For Secretary, [name] has been nominated by the Nominating Committee. Are there further nominations for Secretary from the floor? (*pause*) Hearing none, nominations are closed. The Bylaws state a voice vote is acceptable when there is but one nominee for an office. All those in favor of the slate of officers as presented, say aye. (*pause)* All those opposed, say nay. (*pause)* The ayes have it and the slate as presented is elected. Congratulations.”

If there is a contested position with more than one nomination, “As Chair, I appoint [four people] as tellers for the Teller Committee. Will [specific Teller’s name] serve as chair?” (*pause)* Only those who are paid members may vote. Would all members please stand? A teller will hand you a ballot as you count off. Please sit after saying your number and receiving your ballot. (pause) There are [number] voting members present. The candidates for [position] are [name 1] and [name 2]. Using the ballot provided, write your choice for election. Fold your ballot only once. Have all voted who wish to vote? Will the tellers please collect the ballots?” Tellers count the ballots.Teller Committee Chair stands and says,“The Teller Committee reports there were [number] eligible votes, [number] votes cast, and [number] illegal votes cast. The number of votes needed for election is [number] which is the majority. [Name 1] received [number] votes. [Name 2] received [number] votes.” Presiding chair says, “[Name of winner], having received a majority of the votes cast, is elected [position]. Congratulations.” *Continue to the next officer position.*

The LAPTA officer installs the newly elected officers, if available. Chair of the Planning Meeting: “The newly elected President, [name], shall now take the chair and preside.” The President takes the chair and says, “Thank you for appointing me. I’m honored to serve on the [ABC PTA] and will do all I can to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children. For the bank account, I need to appoint three authorized bank signers who shall be... We also need to create a Budget Committee. Would anyone like to volunteer for the Budget Committee? (pause) The Budget Committee shall be... Will [one of the three names] serve as the committee chair? (pause) Thank you. The date for the next General Membership meeting is [date]. The final item for this meeting is to acquire at least 30 paid memberships which are required to reactivate the PTA. We will do this immediately after the meeting adjourns. A membership in the ABC PTA also gives you membership in Louisiana PTA and National PTA. As the Bylaws state, our dues are [state amounts] which can be paid with cash or online at .CheddarUp.com. We have membership forms for you to complete if you pay with cash. Thank you so much for your support! See you at our next meeting on [date]! Please contact me at [email] with your questions and suggestions for the PTA. The meeting is adjourned.” See the *Sample Membership Form* at the end of this packet. The President completes the *Bylaws and Amendments Approval Form* and submits results online at <https://form.jotform.com/222187872616160>.

**NOMINATING COMMITTEE**

**REPORT**

The Nominating Committee of the PTA/PTSA submits the following slate of officers for the year :

Reference the Bylaws for your elected officer positions. In the event the committee cannot secure a nominee for a position, it remains “open”. All officers must be paid members of this PTA.

For President:

For Co-President:

For Vice-President:

For Second Vice-President:

For Treasurer:

For Secretary:

For [Other]:

For [Other]:

Members of the Nominating Committee:

Name Signature Date

Name Signature Date

Name Signature Date

Name Signature Date

*Nominating Committee members sign the report if they agree with the nominations. Members not in agreement with the recommended slate of officers may not make nominations from the floor.*

*Retain this official report as part of the Secretary’s minutes.*

**BYLAWS AND AMENDMENTS**

**APPROVAL FORM**

Local PTA units are required to establish and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit **LouisianaPTA.org/bylaws** for details. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments in PDF format to **Bylaws@LouisianaPTA.org**. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President’s email.

Local Unit Name Local Unit Parish Local Unit LUR#

President’s Email President’s Phone

The Bylaws or Amendments were approved at the General Membership meeting held on .

 DATE

**Choose one.**

The Local Unit PTA is: Existing PTA Reactivating PTA New PTA

**Choose all that apply.**

The Bylaws approved by the General Membership are attached.

List approved amendments below including the article heading, section number, and line number(s).

If more space is needed for amendments, check here for the attached addendum.

President’s Signature Secretary’s Signature

President’s Name Secretary’s Name

Email the completed Bylaws Approval Form and Bylaws template to **Bylaws@LouisianaPTA.org** in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final, approved document to the President’s email.

Contact Bylaws@LouisianaPTA.org with any questions.

**MOTION FORM**

I move that:

Printed name who made the motion Signature

**FOR SECRETARY’S USE**

Meeting Date Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn

I move that:

Printed name who made the motion Signature

**FOR SECRETARY’S USE**

Meeting Date Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn

 **MEMBERSHIP FORM**

We invite you to join the PTA because we can do more together than apart. There is no right or wrong way to get involved. Anything you can give, whether it's time or money, will support our children's potential.

Complete the form below and submit payment of cash or check. This makes you a member of our local PTA, National PTA (PTA.org), and Louisiana PTA (LouisianaPTA.org) for the year!

**Choose the Membership Type and Quantity**: *Prefill the price for each type of membership. Modify as needed.*

* $ Business: # .
* $ Staff: # .
* $ One Adult: #
* $ Two Adults: #
* $ Student: # .
* $ Grandparent: #

Payment: Cash or online at .CheddarUp.com. **Total Dues Attached: $**

**Circle Membership Type:** Parent Grandparent Staff Student Corporate Other:

First & Last Name: Relation to Student:

Email: Phone:

**Circle Membership Type:** Parent Grandparent Staff Student Corporate Other:

First & Last Name: Relation to Student:

Email: Phone:

**Circle Membership Type:** Parent Grandparent Staff Student Corporate Other:

First & Last Name: Relation to Student:

Email: Phone:

**Circle Membership Type:** Parent Grandparent Staff Student Corporate Other:

First & Last Name: Relation to Student:

Email: Phone:

**Circle Membership Type:** Parent Grandparent Staff Student Corporate Other:

First & Last Name: Relation to Student:

Email: Phone:

**For Corporate** **Memberships**:

Business Name: Name:

 Email: Phone:

 Address:

Thank you for supporting our brand-new PTA!

#PTAForYourChild

**There Is No Wrong Way To PTA. How Do You PTA?**

**Membership Report Spreadsheet**

Download this excel spreadsheet at LouisianaPTA.org/membership.

|  |
| --- |
| LAPTA LOCAL UNIT MEMBERSHIP REPORT 2022-23 |
| After submitting dues, email this Member Report to office@louisianaPTA.org. |
| PTA Name:  |   | Today's Date: |   |
| PTA LUR#:  |   | 2022-23 Membership Goal: |   |
| School Name:  |   | Total Memberships Year to Date: |   |
| School City: |   | New Memberships for this Report: |   |
| School Parish: |   | School's Teacher/Admin Count: |   |
| Your Name: |   | Teacher/Admin Memberships: |   |
| Your Email: |   | School's Student Count:  |   |
| Your Phone: |   | Student Memberships: |   |
| Mailing Street: |   |  |   |
| Mailing City: |   | Mailing Zip Code: |   |
| *The above address is where LAPTA 100 Year Member Pins will be mailed.* |
| Last Name | First Name | Email Address |
| Last Name | First Name | Email Address |
| Last Name | First Name | Email Address |
|  |  |  |
|  |  |  |
|  |  |  |

**TELLER COMMITTEE REPORT**

This is used only if there is a contested election of officers.

Name of PTA/PTSA:

For the Office of

 Number of members eligible to vote

 Number of votes cast

 Number of illegal votes cast

 Number of votes needed for election

Candidate Name: received votes.

Candidate Name: received votes.

Candidate Name: received votes.

*Teller Chair shall make a motion to destroy all ballots after reading the Teller Committee Report.*

Members of the Teller Committee:

Name Signature Date

Name Signature Date

Name Signature Date

Name Signature Date

*Retain this official report as part of the Secretary’s minutes.*

**APPLYING FOR AN IRS EIN**

For new PTA units or existing units in the Reactivation Phase, search online for “Apply for an IRS EIN” and follow the link to the IRS page. Go to Step 3 and click Apply for an EIN Online Now button.

 Page 1: **What type of legal structure is applying for an EIN?** Choose “**View additional types**” and select “**PTA/PTO or School Organization**.” Confirm your selection and click *continue*.

Page 2: **Please tell us about the Responsible Party.** Enter the complete legal name of the President or other Board member and their social security number. Choose “*I am a responsible and duly authorized officer or member of this organization*.” Click *continue*.

Page 3: **Where is the Responsible Party physically located?** Enter the home address of the Responsible Party. **Should the mail be directed to a specific person or department within your organization? If yes, please enter the name:** Enter the PTA name which can be abbreviated. **Do you have an address *different*****from the above where you want your mail to be sent?** Choose *Yes.* Click *continue.*

Page 4: **What is the mailing address of the Responsible Party?** Enter the PTA school’s complete address. Click *continue.*

Page 5: **Tell us about the PTA/PTO or School organization?** Enter the legal name and address and leave T**rade name** field blank. Select date the PTA was established. Click *continue*.

Page 6: **Tell us more about the PTA/PTO or School Organization.** Answer to all questions is probably *No*. Click *continue*.

Page 7: **What does your business or organization do?** Scroll to the bottom and select *other*. Click *continue*.

Page 8: **You have chosen Other. Please choose *one* of the following that best describe your primary business activity:** Choose *Organization (such as religious, environmental, social or civic, athletic, etc.)* Click *continue.*

Page 9: **You have chosen Other: Organization. What is the primary activity of your organization?** Select **Social or civic** and type **Parent Teacher and Student Advocacy.** Click *continue*.

Page 10. **How would you like to receive your EIN Confirmation Letter?** Select **Receive letter online** if you have that capability to open and print a PDF file. Select *continue.* Continue through the final questions.Once you receive your EIN Confirmation Letter, save it!

###### Logo  Description automatically generated

###### **BUDGET APPROVAL FORM**

This form must accompany the approved budget and is submitted with **General Membership Meeting Results Form**.

Local Unit Name Local Unit Parish

The PTA’s budget for the fiscal year was approved at the General Membership meeting held on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

* Attached is the Approved Budget.

President’s Signature Treasurer’s Signature

President’s Name Treasurer’s Name

|  |
| --- |
| **SAMPLE BUDGET XYZ PTSA** |
|  July 1, 2022 – June 30, 2023 |
| **Fundraising** | **Budgeted Income** | **Budgeted Expense** | **Budget Net** |
| Color Run | $20,000 | -$10,000 | $10,000 |
| Uniforms | $15,000 | -$7,500 | $7,500 |
| Shake Days | $5,000 | -$2,000 | $3,000 |
| Grants | $2,000 |  $0 | $2,000 |
| Donations | $750 |  $0 | $750 |
| **Fundraising Totals** | **$42,750** | **-$19,500** | **$23,250** |
| **Student & Parent Programs** | **Budgeted Income** | **Budgeted Expenses** | **Budget Net** |
| Reflections Program | $0 | -$100 | -$100 |
| Breakfast of Champions | $0 | -$500 | -$500 |
| Talent Show | $800 | -$500 | $300 |
| Project Graduation | $0 | -$1,000 | -$1,000 |
| Health Supplies | $0 | -$200 | -$200 |
| Mental Health Speaker | $0 | -$1,000 | -$1,000 |
| Grandparents Bingo | $200 | -$1,500 | -$1,300 |
| Welcome Packets | $0 | -$250 | -$250 |
| Newsletter | $0 | -$250 | -$250 |
| Hospitality | $0 | -$250 | -$250 |
| **Student & Parent Programs Totals** | **$1,000** | **-$5,550** | **-$4,550** |
| **Teacher, School & Community** | **Budgeted Income** | **Budgeted Expenses** | **Budget Net** |
| Staff Welcome Lunch | $0 | -$1,500 | -$1,500 |
| Staff Snack Days | $0 | -$400 | -$400 |
| Teacher Spirit Cart | $0 | -$400 | -$400 |
| Staff Appreciation Week | $0 | -$1,000 | -$1,000 |
| Library Literacy Program | $0 | -$2,500 | -$2,500 |
| Beauitification | $0 | -$1,000 | -$1,000 |
| School Technology | $0 | -$7,500 | -$7,500 |
| Teacher Mini Grants | $0 | -$3,000 | -$3,000 |
| Adopt-a-PTA | $0 | -$1,000 | -$1,000 |
| **Teacher, School & Community Totals** | $0 | -$18,300 | -$18,300 |
| **Administrative** | **Budgeted Income** | **Budgeted Expenses** | **Budget Net** |
| AIM Insurance & Art. of incorp. | $0 | -$500 | -$500 |
| Banking Fees & Interest | $50 | -$100 | -$50 |
| Leadership & Training | $0 | -$500 | -$500 |
| \*Membership Dues | $2,200 | -$1,250 | $950 |
| PTA Office Supplies | $0 | -$1,000 | -$1,000 |
| Start Up Funds | $5,000 | -$5,000 | $0 |
| Carry Forward & Ending Balances | $12,978 | -$12,090 | $888 |
| Zoom | $0 | -$188 | -$188 |
| **Administrative Totals** | **$20,228** | **-$20,628** | **-$400** |
| **Grand Totals** | **$63,978** | **-$63,978** | **$0** |

\*Total income reported on the IRS tax filings for Membership Dues is the net amount, excluding the Louisiana PTA and National PTA dues portions.