

INSTRUCTIONS FOR COMPLETING THE STANDARD BYLAWS

California State PTA issues a new edition of the standard bylaws annually. When submitting bylaws for approval, use only the current edition as indicated by the date on the front cover.

Standard bylaws are available for units in three formats: printed form, fillable pdf format and online with the *e-Bylaws Program* available on the California State PTA website: www.capta.org

To Complete Bylaws – Using the *E-Bylaws Program* online:

- Visit our website - www.capta.org - select *e-Bylaws* and request a password
- After receiving a password in an email, go back to *e-Bylaws* to build unit bylaws
- Complete each screen by entering information and selecting options for your unit
- When finished and saved, a pdf file of updated bylaws is generated to download and print
- Submit bylaws for approval through channels as outlined in *PTA Bylaws Review – 4 Key Steps*

To Complete Bylaws – Using Printed and Fillable PDF Formats:

- Fill in or line out all blanks, as applicable
- Line out words in italics when not applicable as they indicate optional provisions
- Spell out words in full with no abbreviations - e.g, September, second vice president
- Write dates using the long form - e.g, February 7, 2017
- Write numbers as words and place figures in parenthesis - e.g. five dollars (\$5.00)
- Submit bylaws for approval through channels as outlined in *PTA Bylaws Review – 4 Key Steps*

To Make Changes To Bylaws – To meet a unit’s needs, a hard copy of the bylaws may be modified before they are submitted for approval. When making an amendment to the text:

- Write any changes legibly, using only a pen with blue or black ink, or type in changes
- Line out text that does not apply, using one horizontal line

Please Note – Starred sections of the bylaws are legally required to be included in all unit bylaws. They refer to the **Corporation Code of the State of California (**)** or **California State PTA Bylaws (***)** and may not be altered or changed. In addition, sections of the bylaws refer to policies or procedures in the **California State PTA Toolkit** and may not be altered or changed. (Article XI, Section 3)

NOTES – BYLAWS ARTICLES AND SECTIONS:

Article I – Name **Legal Name** – Use a unit’s full legal name as it appears on the bylaws cover page, e.g. Selena Sloan Butler PTA not Butler PTA.

Article IV – Membership and Dues **Student, Teacher and Family Memberships (Section 4)** – Consult with council/district parliamentarian regarding student, teacher and/or family memberships or membership/donations.

Article V – Officers and Their Election **Elections (Section 7)** – Set election month to meet council/district deadline for directory data and for president-elect to attend the California State PTA Convention in late April/early May. Month selected must agree with a month listed in Standing Rule 7.

- Article VII – Association Meetings** **Quorum (Section 5b)** – To ensure general member participation in association meetings, the minimum quorum is the number of officers plus four (4), or eleven (11) whichever is greater. When there are ten (10) or more standing committee chairmen and/or appointed, voting directors or specialists that number is divided by two (2) and added to the association quorum.
- Article VIII – Executive Board** **Standing Committees (Section 1)** – Standing committees function all year, e.g. hospitality, membership, programs, fundraising. They are listed in Standing Rule 17 and their chairpersons are members of the executive board.
- Quorum (Section 6b)** – Minimum quorum for an executive board meeting is based on the number of executive board members, including the principal and teacher representative, (majority = more than half) or five (5) whichever is greater.
- Article IX – Council Membership** **Council Information** – Consult with council parliamentarian to verify agreement with council bylaws.
- Article XII – Articles of Organization** **Incorporated Units** – Attach a copy of the articles of incorporation.
- Article XIII – Identification Numbers and Fiscal Year** **Government Filings** – PTAs are legally required to have a federal Employer Identification Number (EIN), a state Franchise Tax Board (FTB) number and Registry of Charitable Trust (CT) number and to file annual forms with the appropriate agency. Insert the corporation number if the PTA is incorporated. Contact your district PTA for assistance.
- Article XIV – Parliamentary Authority** **Incorporated Units** – Add the unit’s legal name in the blank line.
- Standing Rules** **Standing Rules** – Additional Standing Rules may not conflict with, supersede or restate bylaws and they should not restate Toolkit sections. Attach additional Standing Rules.
- Standing Rule #7** **Association Meeting Dates** – Set the first association meeting early in a school year to ensure approval of PTA programs and budget before programs start or funds expended (Article VII, Section 3).
- Standing Rule #13** **Authorization for Expenditures** – Guidelines for expenditure of unbudgeted funds are as follows (*California State PTA Toolkit*):
- Eight or more association meetings per year – up to \$500.00
 - Five to seven association meetings per year – up to \$750.00
 - Four or fewer association meetings per year – up to \$1000.00

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