

PTA Bylaws – What’s in Them?

Think of Bylaws as your GPS to run and operate your PTA smoothly. They provide direction on PTA policies and practices. Bylaws also contain the main characteristics, rules and operations of our organization as a 501(c)(3) nonprofit organization.

Bylaws tell you about ...

Executive Board and Elections:

- What officers you have and how they are elected
- Officers’ duties with brief job descriptions
- Month of annual election and when term begins
- Nominating Committee and when and how it is elected

Membership:

- How to become a member
- How to define who is a member
- Amount of your annual membership dues
- Due dates to submit membership per capita

Meetings:

- When board and association meetings are held
- Quorums needed to approve motions and PTA business

Committees:

- What Standing Committees you have and what they do
- How committees are formed
- How committee chairmen are appointed and what their duties are

Unit Identification Information:

- Official name of your PTA
- Your unit’s State PTA and National PTA ID numbers
- Your unit’s Employer Identification Number (EIN), Charitable Trust Number (CT#) and Franchise Tax Board Number (FTB#)

Policies, Actions and Procedures:

- Basic policies and purposes of PTA as a nonprofit
- Conditions for units to remain ‘In good standing’
- When required actions like Audits and the Annual Report are completed and sent to council/district
- Process for chartering and disbanding a PTA
- Basic Standing Rules for running your PTA
- Bylaws review process and how to complete standard bylaws

AMENDING PTA BYLAWS

Bylaws may be amended only:

- With prior notice to the membership
- When approved by a 2/3 majority of the membership present (no proxy voting)

Please Note: Proposed bylaws amendments must be submitted through channels to the California State PTA for approval *prior* to submission to the membership for adoption.

Learn more: www.capta.org

How Do Bylaws Differ From Standing Rules?

Bylaws

- Identify primary responsibilities of officers

Example – Second Vice President, Membership Chairman

- State when board meetings are held

Example – The executive board shall meet on the second Tuesday of each month during the school year.

Standing Rules

- List the specifics

Example – The Membership Chairman will conduct membership enrollment of the organization annually.

- Supply details on meeting times and place

Example – The executive board will meet monthly from 6pm to 7pm in the Multi-Purpose Room.

Sample Standing Rules

- The first vice president shall chair the membership committee, which is responsible for coordinating the annual membership enrollment campaign, maintaining a current list of PTA members and providing a copy of that list to the secretary.
- The second vice president shall chair the fundraising committee, which is responsible for setting a fundraising goal and organizing and implementing all fundraising activities.
- This PTA owns a 45-cup coffee pot, a popcorn machine, two electric staplers, three calculators, and three locking moneyboxes. All PTA owned property is kept in the PTA cabinet in the volunteer room.
- Anyone who wishes to borrow the PTA-owned equipment must request permission from the executive board.
- A minimum balance of \$1,000 shall be carried over in the PTA account for the next school year.

Easy Steps for PTA Bylaws Review

PRESIDENT

___ Appoint 3-5 members to bylaws committee

PARLIAMENTARIAN

___ Set meeting date

___ Read detailed instructions (page i):

Procedures for Bylaws Review

___ Read and review bylaws (current and new standard) prior to meeting

___ Obtain necessary information from council or district PTA for Articles IV, VI and X

___ Obtain Bylaws Submittal Form from council or district PTA

___ Bring copy of current bylaws for each committee member

BYLAWS COMMITTEE

___ Read Instructions for Completing the Standard Bylaws (page ii), #1 through #8

___ To assist in the process, follow #9 (pages ii and iii) while reviewing articles

___ List all proposed amendments on separate paper while reviewing; include article, section and page number.

EXECUTIVE BOARD MEETING

___ Parliamentarian presents proposed amendments

___ Executive board votes to approve (outcome recorded in minutes)

___ Use California State PTA's e-Bylaws system to update bylaws or fill-in preprinted standard bylaws.



SUBMITTING BYLAWS

___ Unit parliamentarian keeps one copy

___ Attach Bylaws Submittal Form including list of proposed amendments

___ Attach current Standing Rules

___ Send one (1) original set of bylaws

___ Send two (2) full copies and four (4) additional signature pages (verify number with

council or district PTA)

___ In-council: submit to council parliamentarian

___ Out-of-council: submit to district parliamentarian

___ Make required corrections as detailed by council/district/state parliamentarian

RETURNED BYLAWS AND STANDING RULES

Returned unsigned by State parliamentarian

___ Make required changes

___ Resubmit through channels

Signed by State parliamentarian

___ Schedule association meeting to adopt the amendments to bylaws

___ Notify members at least 30 days in advance

___ Proposed amendments must be included with notice

___ A two-thirds (2/3) vote of the association membership is required to adopt

___ Adopted bylaws are now the official bylaws of the unit

AFTER ADOPTION

___ Secretary and president sign and date original bylaws. The original set is kept with the Secretary's procedure files.

___ Secretary and president sign copies and give one (1) each to president and parliamentarian

___ **Secretary mails two signature pages to council, if in council, or one to district PTA**

COPIES

___ Make a copy for all board members to be kept in their procedure files

___ Provide copy to principal

___ Have copies available for members, upon request

It's the California State PTA Electronic Bylaws program!



Unit PTAs all over California are discovering the fun, fast, easy way to do their bylaws. The e-bylaws program is now available to all but a few units as a service from California State PTA. Your first steps are outlined in "Easy Steps for Bylaws Review." Follow these steps to get online with the e-bylaws.

1. Obtain a user name and password.

Before you can use the e-bylaws program, you will need to obtain a user name and password.

- a. Visit the **www.capta.org** website and click on **e-Bylaws** on the homepage left-hand column.
- b. On the e-bylaws page, click on the **Request a Password** button in the right-hand column.
- c. On the form that opens, enter your first and last name, email address, and phone number. Select your user type. If you are not the unit parliamentarian, select **unit assistant** as the user type. Click **Next**.
- d. Select your PTA district number/name and your PTA council name. Type in your school name, city, and your California State PTA unit ID number. This number can be found on your current bylaws. If you can't find it, contact your council or district for this number.
- e. Enter a user name, all lower case, and write it down. Click **Next**, then **Done** to submit your request. You will be emailed your password in three to five days.

2. Begin using the e-bylaws program.

Once you have your password, go back to the e-bylaws page on the capta.org website and click on the **Build e-Bylaws** button.

When the login page opens, type in your user name and password. Your unit information will appear.

If this is your first time entering information into the e-bylaws program, you will get a message that bylaws information is incomplete. Click on **OK** to dismiss this message.

- The first screen is the **Unit Information Record**. This information can only be entered or changed by California State PTA

office staff. If the information is complete and correct, click **Next**. If the information is incorrect, contact your PTA district for assistance.

- Proceed through the each input screen and complete each blank by entering information or clicking on the "radio buttons."
- **Remember to save often so your data is not lost.**
- When finished, click on **Save** one final time, then click on **Bylaws**.
- A PDF file will be generated. Review your entries at this time.

If you see a **DRAFT** watermark across the pages, an error or missing information must be corrected. Work your way through each page, looking for a red outline on the information boxes. Move your cursor over each red box to receive directions for correcting the problem.

3. Complete the process.

Once you have your PDF file, make sure to review each page. Pay special attention to dues, to audit months in the bylaws and to standing committees in the standing rules.

When the bylaws are satisfactory,

- print out four back-to-back copies,
- plus an additional four back-to-back copies of the signature sheet. (Consult your council or district on the exact number of copies required.)

Keep one bylaws copy for reference, and send the remaining copies and signature sheets, along with a **Bylaws Submittal Form** available from PTA council or district.

Unit Bylaws Worksheet for E-Bylaws

Items in *italics* are filled in by the e-bylaws program using unit, council and district information records.

<p><i>Unit Legal Name:</i> _____</p> <p><i>Name of district:</i> _____</p> <p><i>Name of council:</i> _____</p> <p><i>School address (front cover): Street:</i> _____</p> <p style="text-align: center;"><i>City:</i> _____ <i>ZIP:</i> _____</p> <p><i>Organization Date (front cover):</i> _____</p> <p><i>Fiscal Year begins:</i> _____ <i>ends:</i> _____</p> <p><i>Grades in school:</i> _____</p> <p><i>National ID #:</i> _____ <i>California ID #:</i> _____</p> <p><i>IRS Federal EIN:</i> _____ <i>CT No.</i> _____ <i>FTB No.</i> _____</p> <p><i>Individually incorporated units: Corporation No.:</i> _____</p>
<p>Membership Dues (p. 3): \$ _____ per member (the program will fill in the rest)</p> <p>(\$2.25 National; \$2.00 California; \$ _____ District; \$ _____ Council \$ _____ remains in unit)</p>
<p>Officers: President, secretary, treasurer, and (<i>check those you have below</i>):</p> <p><input type="checkbox"/> Executive VP</p> <p>Does the EVP serve notice of a vacancy in the presidency? <input type="checkbox"/> Yes <input type="checkbox"/> No, 1st VP does it</p> <p><input type="checkbox"/> Vice Presidents - How many? _____</p> <p><input type="checkbox"/> Corresponding Secretary <input type="checkbox"/> Financial Secretary</p> <p>Is the Auditor an officer? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Nominating Committee:</p> <p>Number of members: _____ Number of alternates _____</p> <p>Date officers assume duties (p. 6): _____</p>
<p>Association Meetings:</p> <p>Week and Day of Month (e.g., second Tuesday): _____</p> <p>Months: _____ (must include election month and audit approval months)</p> <p>Annual meeting month: _____</p> <p>Special meetings can be called upon the written request of _____ board members</p> <p>Quorum (the greater of 11 or # of officers +4): _____</p>
<p>Executive Board Meetings:</p> <p>Meets once per month during school year. Week and day of month: _____</p> <p>Amount authorized for unbudgeted items between association meetings: \$ _____</p> <p>Special meetings can be called upon the written request of _____ board members</p> <p>Quorum (the greater of 5 or majority* of officers + 1) _____ (*majority = more than half)</p> <p>If your auditor is appointed, appointment is ratified in the month of _____</p>

<p>Committees:</p> <p>Reports of committees filed with ___ president ___ historian [choose one]</p>
<p>Council Membership:</p> <p>Number of additional delegates for regular meeting: _____</p> <p>___ Elected ___ Appointed [<< choose one] in _____ [association meeting month]</p> <p>Length of term: _____ year(s)</p> <p>Number of additional delegates for annual election meeting: _____</p> <p>Council assessment (if any) (p. 24): \$ _____ due to council on _____</p>
<p>Duties of Officers:</p> <p>Reports of officers filed with ___ president ___ historian [choose one] (p. 12)</p> <p>___ [First] Vice President also serves as _____</p> <p>___ Second Vice President also serves as _____</p> <p>___ Third Vice President also serves as _____</p> <p>___ Fourth Vice President also serves as _____</p> <p>___ Fifth Vice President also serves as _____</p> <p>___ Sixth Vice President also serves as _____</p> <p>NOTE: Add chairman, director, coordinator to above. E.g.: First vice president also serves as programs director.</p>
<p>Signature Authority:</p> <p>Signed by president, treasurer, and _____ [elected officer/s]</p> <p>[Cannot be secretary or auditor; cannot reside in the same household as the president, treasurer, financial secretary, or auditor]</p>
<p>Deposits:</p> <p>If you have a financial secretary, does the financial secretary remit funds to the treasurer? (I.e., the financial secretary does not make deposits) ___ Yes, remitted to treasurer ___ No</p>
<p>Audits (months):</p> <p>Midyear Completed: _____ to Board: _____ Adopted: _____</p> <p>Year-end Completed: _____ to Board: _____ Adopted: _____</p> <p>If your fiscal year end is different from when your officers take office, you must do a third audit:</p> <p>Completed: _____ to Board: _____ Adopted: _____</p>
<p>Standing Committees (some typical committees are listed; use/add the ones you have):</p> <p>___ Membership ___ Ways and Means ___ Hospitality ___ Programs</p> <p>___ Other (list): _____</p> <p>_____</p> <p>_____</p>
<p>NOTES:</p> <ol style="list-style-type: none"> 1. If you have ten or more standing committees, increase your minimum board and association quorums by half their number (e.g., 10 standing committees: increase quorums by 5). 2. Specialists (e.g., volunteer coordinator, newsletter editor, webmaster) are not committees and should not appear in the list of committees.