

# Parliamentarian - Bylaws Packet



**Service Mailing**  
**July 2010**

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TO: PTA/PTSA Leaders

FROM: Sue King  
Parliamentarian

The new June 2010 standard *Bylaws for Local PTA/PTSA Units* are enclosed, along with a summary of the most recent changes. All units must adhere to these changes, whether or not they have updated to the most current standard bylaws.

Bylaws may be purchased from the California State PTA office for \$0.35 each. English/Spanish bylaws are also available. A *List of PTA Materials* and a *PTA Materials Order Form* may be found under the Introduction tab in the *California State PTA Toolkit* or on the website at [www.capta.org](http://www.capta.org). Click on "Forms." The *PTA Materials Order Form* is listed in the left column and the *List of PTA Materials* is in the right column.

Bylaws must be reviewed every year and updated at least every three years. Before beginning your review or update, please read and follow the "Procedures for Bylaws Review" and "Instructions for Completing the Standard Bylaws" on pages i – iii of each set of standard bylaws. If you have questions or are unsure how to complete any section, contact your council or district parliamentarian for assistance.

**NOTE:**

The June 2009 edition of unit, council and district bylaws will be accepted through November 1, 2009. After that date, bylaws on the June 2009 template will be returned through channels to be rewritten on the June 2010 template.

**TIPS:**

- Take time to review your PTA's bylaws as part of your executive board orientation and planning over the summer. This practice provides board members with a great review of job responsibilities and the basic information needed to keep the PTA running smoothly.
- Complete the attached one-page *Unit Bylaws Information Summary* and place it in each officer's procedure book for quick reference.

## Unit Bylaws Information Summary

Unit Legal Name (front cover): \_\_\_\_\_  
National ID # (front cover): \_\_\_\_\_ California ID # (front cover): \_\_\_\_\_  
Organization Date (front cover): \_\_\_\_\_  
Fiscal Year (p. 21): \_\_\_\_\_ EIN (p. 21): \_\_\_\_\_  
Date of last bylaws update (p. 23): \_\_\_\_\_

**Membership Dues** (p. 3): \$ \_\_\_\_\_ Forward: \$ \_\_\_\_\_  
(\$1.75 National; \$1.25 California; \$ \_\_\_\_\_ District; \$ \_\_\_\_\_ Council)

Date first remittance due to council/district for award eligibility (p. 4, Section 6): \_\_\_\_\_

Date first required remittance due to council/district (p. 4, Section 7): \_\_\_\_\_

**Officers** (pp. 5 - 7): List on reverse

Date officers assume duties (p. 6): \_\_\_\_\_

**Nominating Committee** (p. 5): Elected by association in (month) \_\_\_\_\_

Number of members: \_\_\_\_\_ Month of annual election meeting: \_\_\_\_\_

Note: Nominating Committee report due to association 30 days prior to election meeting

### Signature Authority:

Authorizations for Payment (pp. 7 – 9): *Recording Secretary* or *Financial Secretary* and President

Checks (p. 9): President, treasurer, and \_\_\_\_\_

Contracts (p. 7): President and one other elected officer

### Audits (p. 11):

Completed (months): \_\_\_\_\_ and \_\_\_\_\_ and \_\_\_\_\_

Presented to Board (months): \_\_\_\_\_ and \_\_\_\_\_ and \_\_\_\_\_

Presented to Association (months): \_\_\_\_\_ and \_\_\_\_\_ and \_\_\_\_\_

*A third audit is required for units who's term of office and fiscal year don't coincide.*

**Association Meetings** (pp. 13-14): Quorum: \_\_\_\_\_

Week and Day of Month (i.e., second Tuesday): \_\_\_\_\_

Months: \_\_\_\_\_

**Executive Board Meetings** (pp. 14-16): Quorum: \_\_\_\_\_

Meets once per month during school year, week and day of month (Must be 14 days before the Association Meeting) \_\_\_\_\_

Amount authorized for unbudgeted items between association meetings: \$ \_\_\_\_\_

Council Membership (p. 18): \_\_\_\_\_

Reports Due To Council/District: List of officers/chairs (p. 7): \_\_\_\_\_

Adopted Budget (p. 9): \_\_\_\_\_

Annual Financial Report (p. 10): \_\_\_\_\_

Insurance Report (p. 10): \_\_\_\_\_

Audits (p. 11): \_\_\_\_\_

Government Filings (taxes, etc.) (p. 10): \_\_\_\_\_

## Summary of Amendments

### *Bylaws for Local PTA/PTSA Units*

1. Editing for grammar and formatting changes throughout
2. Page ii – Instructions for completing the standard bylaws
  - Article V, Section 3c - With a nominating committee of three elected members, a majority would be 2 members. Two members would be charting the course for the PTA for the coming PTA term. Consider a larger group (5-7 members) for a more representative committee.
3. Page iii
  - Article VII, Section 5b (p. 14) – The voting power of the association is equal to all members as stated in Article VII, Section 6. The quorum must assure general member participation beyond that of the executive board. The minimum quorum for an association meeting is the number of officers plus four (4) additional members or eleven (11), whichever is greater. Officers are listed in Article V, Section 2. In order to ensure that there is participation by standing committee chairmen in association meetings, the following calculation will determine the number to add to the quorum. If there are ten (10) or more standing committees that number will be divided by two (2) and added to the association quorum.
  - Article VIII, Section 7b (p. 16) – The quorum for an executive board meeting is based on the number of executive board members, including the principal and teacher representative (majority = 1/2 increased to the next whole number) or five (5) whichever is greater. Standing Rules 9. Standing committees are those committees that meet all year long, i.e., membership, health and safety, and hospitality. The chairman of a standing committee is a member of the executive board. In order to ensure that there is participation by standing committee chairmen in executive board meetings, the following calculation will determine the number to add to the quorum. If there are ten (10) or more standing committees that number will be divided by two (2) and added into the calculation for the executive board quorum.

### **Bylaws Changes**

#### Page 9 Article VI – Duties of Officers

1. Section 6 The treasurer shall
  - d. Receive monies *from the financial secretary* for the association, giving a receipt therefore, and deposit immediately in the name of the association in a bank approved by the executive board.

#### Page 10 Article VI – Duties of Officers

2. Section 7 The financial secretary shall
  - a. Give a receipt for monies received for the association and remit at once to the treasurer or deposit in a bank approved by the executive board and give a copy of the deposit slip to the treasurer.

## *Easy Steps for 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
  - ~ Check with council or district PTA for necessary information for Articles IV, VI and X
  - ~ Contact council or district PTA for Bylaws Submittal Form
  - ~ 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)
  
- 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 four (4) copies and 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**
  - 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 signs and dates original bylaws and keeps the original set in the procedure book
  - ~ Secretary signs copies and gives one (1) each to president and parliamentarian

**Returned unsigned by State parliamentarian**

  - ~ Make required changes
  - ~ Resubmit through channels
  
- COPIES**
  - ~ Make a copy for all board members to be kept in their procedure books
  - ~ Provide copy to principal
  - ~ Have copies available for members, upon request

## English ~ Spanish Bylaws Terms

### Numbers

### Ordinals

1	uno		1st	primero
2	dos		2nd	segundo
3	tres		3rd	tercero
4	cuatro		4th	cuarto
5	cinco		5th	quinto
6	seis		6th	sexto
7	siete		7th	séptimo
8	ocho		8th	octavo
9	nueve		9th	noveno
10	diez		10th	décimo
11	once		11th	undécimo
12	doce		12th	duodécimo
13	trece		13th	decimotercero
14	catorce		14th	decimocuarto
15	quince		15th	decimoquinto
16	dieciséis		16th	decimosexto
20	veinte		17th	decimoséptimo
30	treinta		18th	decimooctavo
40	cuarenta		19th	decimonoveno
50	cincuenta		20th	vigésimo
60	sesenta		21st	vigésimo-primero
70	setenta		22nd	veinte-segundo
80	ochenta		23rd	veinte-tercero
90	noventa		24th	veinte-cuarto
100	cien		25th	veinte-quinto
200	dos cientos		26th	veinte-sexto
300	tres cientos		27th	veinte-séptimo
400	cuatro cientos		28th	veinte-octavo
500	quinientos		29th	veinte-noveno
600	seis cientos		30th	trigésimo
700	siete cientos		31st	treinta-primero
800	ocho cientos		32nd	treinta-segundo
900	novecientos		33rd	treinta-tercero
1000	mil		34th	treinta-cuarto

## English ~ Spanish Terms

English	Spanish	English	Spanish
Annual financial report	informe financiero anual	March	marzo
Annual report	informe anual	May	mayo
Appointed	Designado	Membership	afiliación
Appointment	Designación	Monday	lunes
April	Abril	National	nacional
Articles of organization	actas de organización	Nominations	nombramientos
Association meeting	reuniones de la asociación	Non commercial	no comercial
Audit	Auditoría	Non partisan	no partidaria
August	Agosto	Non sectarian	no sectaria
Authorization for payment	autorización de pago	November	noviembre
Basic policies	políticas básicas	October	octubre
Budget	Presupuesto	Officer	oficial
Cents	Centavos	Out of council	fuera de consejo
Charter procedure	procedimiento de constitución	Per capita dues	cuotas per cápita
Constituent organizations	organizaciones constituyentes	Programs	programas
Council	Consejo	Purposes	propósitos
December	Diciembre	Quorum	quórum
Deposit	Depósitos	Receipts	recibos
Disbursements	Salidas	Remainder	los demás
District	Distrito	Remit through channels	envíe a través de los canales usuales
Dollar/s	dólar/es	Remit	remitir
Dues	Cuotas	Remittance	pago
Elected	Elegido	Safety	seguridad
Elections	Elecciones	Saturday	sábado
Executive	Ejecutivo	September	septiembre
Expenditures	Gastos	State	estado
February	Febrero	Sunday	domingo
Finance	Finanzas	Tax returns	declaración de impuestos
Financial records	registros financieros	Thursday	jueves
Financial secretary	secretario de finanzas	Tuesday	martes
Friday	Viernes	Unit	unidad
Fundraising	recaudación de fondos	Vice president	vicepresidente
Gross income	ingreso bruto	... of membership	vicepresidente de la calidad de miembro
Health	Salud	Ways and Means	formas y medios
Historian	Historiógrafo	Wednesday	miércoles
Hospitality	Hospitalidad		
January	Enero		
July	Julio		
June	Junio		
Ledger	libro mayor		
Legislation	legislación		