

PTA BYLAWS REVIEW – 4 KEY STEPS

1. TO GET STARTED

President – Appoints bylaws committee, chaired by parliamentarian

Parliamentarian – Sets meeting date for bylaws committee

- Goes online – www.capta.org - to sign up for California State PTA's **e-Bylaws Program** to update Bylaws
- Reviews current Bylaws prior to meeting
- Provides copy of current Bylaws for each bylaws committee member



Bylaws Committee – Reviews current Bylaws to see if any changes are necessary

- Lists proposed amendments, including article, section and page number

Parliamentarian – Uses **e-Bylaws Program** to complete and then download a pdf of updated Bylaws with amendments, if any

- Prints double-sided, hard copy of Bylaws to keep for unit reference

Executive Board – Parliamentarian presents updated Bylaws with proposed amendments at board meeting or recommends no changes

- Board votes to approve
- Secretary records outcome in Minutes

2. TO SUBMIT BYLAWS FOR APPROVAL

Parliamentarian – Makes double-sided copies of updated Bylaws (3) and Signature Pages (4)

- Sends to council, if in council, or district:
 1. Three (3), double-sided, copies of Bylaws

2. Four (4) additional Signature Pages
3. Completed *Bylaws Submittal Form*, listing proposed amendments, if any (download from *California State PTA Toolkit* online)

Council/District Parliamentarian – Reviews Bylaws and recommends corrections, if any

- Forwards Bylaws through channels to California State PTA for approval

3. TO ADOPT BYLAWS

After approved Bylaws are signed by the State PTA Parliamentarian and returned through channels to your unit/council:

President – Puts adoption of Bylaws amendments on agenda for next association meeting

- Notifies members of proposed amendments (30 days before meeting)

Members – Vote to adopt Bylaws at association meeting, with two-thirds (2/3) vote required

President and Secretary – Sign and date master set of Bylaws for secretary to keep in his/her files

- Sign and date copy of Bylaws for president and one for parliamentarian

4. TO COMPLETE BYLAWS REVIEW

Parliamentarian – Sends two (2) copies of signed and dated Signature Page to council, if in council, or one (1) to district PTA to file

- Makes copies of Bylaws to give to executive board members

Questions? – Contact your PTA council/district parliamentarian.

California State PTA Electronic Bylaws Program



Did you know that there's a fast and easy way to update Unit Bylaws, using the California State PTA's *e-Bylaws Program* online?

HOW TO SIGN UP – Before using *e-Bylaws*, get a user name and password:

- Go online to www.capta.org and click on **e-Bylaws** under 'PTA Leaders' tab – 'Services'
 - On the *e-Bylaws* home page, click on the **Request a Password** button.
- Fill in the form with your name and contact information.
 - Select user type. If you are not the unit parliamentarian, select **unit assistant**. Click **Next**.
 - 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 found in your current Bylaws. If you can't find it, contact your council or district for this number.
 - 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.

HOW TO USE E-BYLAWS – Once you have a password, go online to *e-Bylaws*:

- Click the **Build e-Bylaws** button and log on with your user name and password.
 - Your unit data will appear. If this is your first time adding data to *e-Bylaws*, you will get a message, 'Bylaws 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. If the information is complete and correct, click **Next**. If it is incorrect, contact your PTA district for assistance.
- Go through each screen, saving often. Enter data or click on buttons to build your Bylaws.
- When finished, click **Save** one final time, then click on **Bylaws** to generate and download a PDF file of your Bylaws. Check your entries at this time.
 - If there's a **DRAFT** watermark on the pages, an error or missing information, it must be corrected. Go through each screen, looking for a red outline on the information boxes. Move your cursor over any box with a red outline to get directions to correct the problem.

HOW TO COMPLETE THE PROCESS – Download the PDF file of your Bylaws:

- Review each page and print 4 double-sided copies of Bylaws and 4 additional, double-sided copies of the Signature Page. Keep 1 copy of your Bylaws for reference.
- Send 3 copies and 4 Signature Pages plus completed **Bylaws Submittal Form**, in *California State PTA Toolkit* online, to your council, if in council, or your district PTA parliamentarian.

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

July 2019

UNIT BYLAWS WORKSHEET FOR E-BYLAWS

INSTRUCTIONS: Fill out this worksheet to record information about your unit’s Bylaws. It provides a quick summary for building your Bylaws online with the E-Bylaws Program.

UNIT INFORMATION (AUTO-FILLS IN E-BYLAWS WITH UNIT DATA):

Unit Legal Name: _____

Name of PTA District: _____

Name of PTA Council: _____

School Street Address: _____

City: _____ ZIP: _____

PTA Organization Date: _____ Grades in School: _____

Fiscal Year Starts: _____ Fiscal Year Ends: _____

National PTA ID #: _____ California PTA ID #: _____

IRS Federal EI #: _____ FTB #: _____ CT #: _____

Individually Incorporated Unit – Corporation #: _____

Membership Dues: \$ _____ per member (and program auto-fills the following data):

\$2.25 National PTA, \$2.00 California State PTA \$ _____ District \$ _____ Council

\$ _____ (This amount remains in unit.)

Officers: President, Secretary, Treasurer, Parliamentarian and Historian and
(Check all of your unit board positions):

- Executive Vice President EVP serves notice of president’s vacancy? Yes No
- Vice Presidents – How many? _____ Corresponding Secretary
- Financial Secretary Auditor

Nominating Committee: # of Members: _____ # of Alternates: _____

Date officers assume duties (month/day e.g. July 1): _____

Association Meetings: (Week/Day e.g. Third Monday): _____

Months: _____

Months: _____

Annual Meeting Month: _____ Quorum (the greater of 11 or # of officers + 4): _____

Special Meetings called at written request of _____ (number) of board members.

Board Meetings: (Week/Day e.g. First Monday): _____

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

Special Meetings called at written request of _____ (number) of board members.

Quorum (the greater of 5 or majority of officers + 1): _____

Council Membership (Auto-fills in E-Bylaws with Council Information):

Number of additional delegates for regular meeting: _____

Elected OR Appointed in _____ (Association meeting month.)

Length of term: _____ year(s) # of additional delegates for Annual Meeting: _____

Council Assessment (if any) \$ _____ Due to council on: _____

Vice Presidents: (Add area of responsibility and title for VPs – e.g. 'Programs Chairperson'):

First Vice President serves as _____

Second Vice President serves as _____

Third Vice President serves as _____

Fourth Vice President serves as _____

Fifth Vice President serves as _____

Sixth Vice President serves as _____

Additional Check Signer: (Elected officer who does not reside in same household as president, treasurer, financial secretary, or auditor. Also, can't be the secretary or the auditor):

President, treasurer and: _____

Standing Committees (List committees that function all year):

Membership Programs Fundraising Hospitality Family Engagement

Note: If you have 10 or more standing committees, increase your minimum board and association quorums by half their number (e.g., 10 standing committees: increase quorums by 5). Specialists such as a volunteer coordinator or webmaster are not included in this list.

BYLAWS SUBMITTAL FORM FOR UNITS AND COUNCILS

PLEASE ATTACH THIS FORM TO EACH SET OF BYLAWS SUBMITTED FOR APPROVAL

In-council units SUBMIT TO: Your council parliamentarian

Council parliamentarian and out-of-council units SUBMIT TO:

Linda Morgan, Parliamentarian

Thirty-Third District PTA

PO Box 1235 Lakewood, CA 90714

Email: pta33rdparliamentarian@gmail.com

BYLAWS FOR:

Unit: _____

Council: Torrance Council of PTAs

District: Thirty-Third District PTA, Inc.

Organization Date: _____

California State PTA ID #: _____ National PTA ID #: _____

EIN #: _____ FTB #: _____

Registry of Charitable Trust #: _____

Incorporation # (if applicable): _____

Fiscal Year: July 1st to June 30th

ENCLOSED IS:

ONE (1) ORIGINAL DOUBLE-SIDED SET OF BYLAWS WITH STANDING RULES,

FOUR (4) DOUBLE-SIDED COPIES OF THE SIGNATURE PAGES, AND

A \$5.00 CHECK PAYABLE TO "THIRTY-THIRD DISTRICT PTA" (bylaws copying charge) *

FOR: (check all that apply)

New unit New council Organization Date: _____

Update to most current edition without changes

Change of Status/Name Change (District PTA to attach COS form signed by district president)

Mandatory update required to reinstate charter/recognition

Proposed amendments as listed on page 2 of this form

Additional standing rules attached as required Unit/council has no additional standing rules

FROM: Unit parliamentarian's name: _____

Address: _____

Phone: (____) _____ Email: _____

Council parliamentarian's Name: Diane Wang

Address: 18005 Ardath Avenue, Torrance CA 90504

Phone: (310) 292-4727 Email: tcptaparliamentarian@gmail.com

Date Submitted to Council (for unit use only): _____ Date Submitted to District (for council use only): _____

* \$5.00 is optional during the Interim Bylaws Submittal Process, which means you only need to pay if you would like for Thirty-Third District PTA to provide you with hard copies of your bylaws.

