PARLIAMENTARIAN WORKSHOP
4TH DISTRICT PTA

Bylaw Renewal Guidelines and Steps
PTA BYLAW REVIEW PROCESS

UNIT
Bylaws Committee reviews Bylaws
Executive Board votes to approve proposed amendments.

UNIT Parliamentarian Submits to Council Parliamentarian
1 Original, 2 Copies, 4 Signature Pages and Bylaws submittal form

Council Parliamentarian Reviews & sends to 4th District
1 Original, 1 Copy, 4 Signature Pages
Bylaws submittal form

4th District Parliamentarian Returns to Council
1 Original
3 Signature Pages
Keeps 1 Signature Page

State Parliamentarian
Reviews, signs, returns to 4th District
1 Original
4 Signature Pages

4th District Parliamentarian Reviews & sends to CA State PTA
1 Original, 4 Signature Pages
Bylaws submittal form

Council Parliamentarian Returns to Unit
1 Original
2 Signature Pages
Keeps 1 Signature Page

Unit
Incorporates changes, if any
Gives association 30 days to review, then adopts.

Unit
Once adopted by association, Secretary and President sign unit original & make 2 copies to send to Council and 4th District with signatures and adoption date.

DOUBLE SIDED (PGS 13-14 IN YOUR BYLAWS)
The 2018 Bylaws are now in the system. All Bylaws updated on-line as of February 1, 2019 will look like this.....
The 2018 Revised Bylaws have been streamlined and reduced in size.

How Often do We Renew Our Bylaws

As of January 2019 Bylaws are to be renewed once every (3) years from the date of signature from the State Parliamentarian.

This date does not matter. This is the date the system updated the bylaw template. The date your Bylaws are signed by the State Parliamentarian is the date that your Bylaws are officially updated and RENEWED.
Easy Steps for PTA Bylaw 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

Bylaws - An Essential Role in Your PTA

People tend to think of several things when they hear the term “bylaws” including “restrictive,” “rules,” and “Who needs them?” to name a few. But the more familiar you are with unit, council or district bylaws, the more you’ll appreciate their contribution to running an organization smoothly. The cover page indicates the date your PTA was organized. The internal signature page indicates when bylaws were last adopted. Bylaws should be updated annually and updated at least every three years or whenever changes are needed.

Contact your PTA council or district parliamentarian for assistance or information on updating your bylaws.

**Article I**

The bylaws state the name of the organization as it was chartered. This is the legal PTA name and must appear on all legal documents such as minutes, tax filings, any communication to state PTA, etc.

**Article II**

States the purpose of the organization. The board should review its PTAs goals to ensure alignment with the purposes of PTA.

**Article III**

Outlines the basic requirements of the executive board, including non-competitive, non-partisan policies. It states PTA cannot enter into relationships with other organizations – with exceptions. Study the Toolkit to learn what the exceptions are. Article III also details what to do should the unit, council or district be dissolved.

**Article IV**

Details membership per capita dues and how much goes where, remittance deadlines and other pertinent membership information.

**Article V**

Lists required officers, nominating committee requirements, term restrictions and dates of elections.

**Article VI**

Gives details of officers and their duties as stated in the bylaws. This covers president, vice presidents, secretary, treasurer, etc.

**Article VII**

Could be retitled Every Time You Always Wanted to Know About Association Meetings but Didn’t Know Where to Look.

Literally everything to know about an association or general meeting is contained here: day of the week and the meeting month; which meeting elections are held; the required meeting quorum; who can make motions, debate and vote; the budget; programs and expenditures which must be approved by the membership; and requirements for calling special meetings – and there’s a few. Finally, article X discusses proxy voting, which is never allowed.

**Article VIII**

Is full of information about the executive board; who is included on the board, what the board does, how the board approves payments, what committees it can create, and how to fill board vacancies. Members of the executive board may not serve as paid employees of or under contract to the association (conflict of interest). Here learn how to call a special meeting and how to legally remove a non-attending officer or one whose conduct is injurious to the organization. “Due process” is fully outlined and must be followed.

**Article IX**

Covers committees. Essential knowledge in this section is how to form committees, how long the committees serve, how to make and file committee reports and the due process for committee chairman.

**Article X**

Covers council PTA membership. It states to which council you belong (if in council), the amount of council per capita dues, and who represents the PTA at council meetings. Out-of-council PTAs strike this article and renumber the remaining articles.

**Article XI**

Details the charter procedure for all local PTAs organized under the authority of California State PTA. The requirements of constituent organizations – units in good standing – are found here.

**Article XII**

Explains PTA’s relationships with National PTA and California State PTA and that the bylaws “may not conflict with either.

**Article XIII**

Contains the Articles of Organization.

**Article XIV**

States the start and end of the fiscal year and various identification numbers assigned to the PTA.

**Article XV**

States the parliamentary authority that is Robert’s Rules of Order Newly Revised. Parliamentary authority empowers PTAs in achieving proper meeting procedures and respecting every member’s opinion.

**Article XVI**

Outlines the bylaw amendment procedure.

Bylaws play an essential role in the PTA organization. Open your copy, review them as a board, and start learning today!
Begin by clicking “PTA Leaders”
Click “Services” on the Drop Down Menu
Click “E-Bylaws” on the next Drop Down Menu

http://capta.org/pta-leaders/services/ebylaws/
Before gaining access to E-Bylaws you must first request a Username and Password. Once a request has been submitted it takes between 24-48 hrs for that request to be approved and a Username and Password sent to you.

Once you receive your approval email, you will need to go back to the same website link to gain access to E-Bylaws.
Once you register for a Username and Password you will receive an email with that information:

From: Marisol Sifuentes <msifuentes@capta.org>
To: Patty Hearst <phearst@aol.com>
Sent: Thu, Apr 3, 2014 9:54 am
Subject: Your e-bylaws login info

Dear Patty:

Welcome to the California State PTA’s e-Bylaws system. Your user name, password and helpful links can be found at the end of this letter.

At this time, the e-Bylaws program does not allow for electronic submission.

If you have any questions at all, please contact your council or district parliamentarian first with your questions and then feel free to email californiastatepta@capta.org if you need further assistance.

User Name: tohs2323
Password: t3QHe4K2R5

The password is case sensitive. Links to e-Bylaws tools include:

Once you log in, you may change your Username and Password under your Account Information.
Refer to the Flow Chart for the steps needed to complete the submission of your Bylaws.

There is NO on-line submittal for Bylaws!!
All Bylaws must be printed off and submitted according to the guidelines.

**Bilingual – Council – District Bylaws are NOT available for updates in the E-Bylaw system.**
These must be done using a Fillable PDF.

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

- Click the **Access 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 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. 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 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 for directions to correct the problem.

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

- Review each page and print four (4) double-sided copies of bylaws and four (4) additional, double-sided copies of the signature page.
- Remember to keep a copy of your bylaws for reference. Send three (3) copies and four (4) signature pages plus a completed **Bylaws Submittal Form**, found in the California State PTA Toolkit online, to your council, if in council, or your district PTA parliamentarian.
TALKING POINTS

Quorum:

- The E-Bylaws system will calculate the Quorum required for both the Association Meeting and the Executive Board meeting based on your Elected Board members and your standing committees.
- The minimum quorum for an association meeting is the number of elected officers plus 4, or the number 11, whichever number is greater. (i.e. if your calculation gives you the number 9, your minimum quorum must be 11, which is the greater number) If there are 10 or more standing committees, that number will be divided by 2 and added to the association quorum.

“Draft”:

- If you complete your on-line changes and the pdf that is created has “Draft” printed across the pages – something is incorrect, and you must go back through your bylaws to find the error.

“Save”:

- After you make a change be sure to click “save” at the bottom as you continue through the screens.

Standing Rules:

- There are 18 Standing Rules in the new 2018 Version. These HAVE CHANGED since the last version. Please take note that some sections from the Bylaws are now under Standing Rules.
QUESTIONS?

STEPHANIE KLAUSS
4TH DISTRICT PARLIAMENTARIAN
4THDISTRICTPARLIAMENTARIAN@GMAIL.COM
714-717-4045 CELL PHONE