

## INSTRUCTIONS FOR COMPLETING THE STANDARD BYLAWS

The current standard bylaws MUST be used when submitting bylaws for approval. The California State PTA prints the date on the front cover and at the bottom of each page. USING OUTDATED STANDARD BYLAWS IS CAUSE FOR THE BYLAWS TO BE RETURNED UNSIGNED.

Bylaws and standing rules may be modified to meet the needs of the association. Use of the e-Bylaws system found on the California State PTA website is encouraged. Standard bylaws are available in printed form or fillable pdf. ANY VERSION OTHER THAN THE STANDARD VERSION WILL NOT BE ACCEPTED. The bylaws are a legal document and additions and/or bylaws changes must be written legibly in blue or black ink or typed. Do not use pencil, black marker or any other ink color. All blanks must be completed or lined out. Additional copies of the e-Bylaws or standard bylaws may be photocopied using the legally required double-sided format.

1. DO NOT ALTER, CHANGE, OR ADD TO ANY ARTICLES OR SECTIONS WITH STARS except for completing blank lines. Authority for the articles and sections marked with stars are from the California State PTA bylaws (\*\*\*) or are required by the Corporation Code of the State of California (\*\*) and shall be included in all unit bylaws.
2. Several sections refer to information in the **California State PTA Toolkit** and MAY NOT BE ALTERED. These are policies or procedures of the California State PTA. See Article XII, Section 3.
3. Words in *italics* indicate optional provisions and SHOULD BE LINED OUT when not applicable.
4. To line out, neatly draw a single straight horizontal line through each word and/or sentence which does not apply. Do not use a slash or an X to strike. Do not use white-out or a wide-tipped marker.
5. Words in brackets [ ] are for information or directions only. They have been pre-lined out, e.g., \_\_\_\_\_ [~~month~~], but you must follow the directions given in them.
6. Use the association's full legal PTA or PTSA name on the cover: *Selena Sloan Butler PTA* not *Butler PTA*; or *Phoebe Apperson Hearst High School PTSA*, not *Hearst High PTSA*. The association name is located on the charter.
7. Spell out all words; do not use abbreviations, e.g., Sept - September; 2<sup>nd</sup> - second; VP - vice president. Use the long form for dates – February 7, 2016.
8. Write numbers as words and place figures in parenthesis, e.g., one (1); twenty (20), five dollars (\$5.00); twenty-five cents (\$0.25). Do not duplicate words already included in the printed text.
9. The following articles and sections require special attention:
  - a. Article I (p. 1) – If out-of-council, line out “*of the*” and insert “out of” in blank.
  - b. Article IV, Section 4 (p. 3) – Line out unused blanks. Consult with council/district parliamentarian regarding faculty, student and/or family memberships or membership/donations.
  - c. 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.
  - d. Article V, Section 3g (p. 5) must agree with Article V, Section 7 (p. 6) and Article VII, Section 1 and 2 (p. 13). Set the election month early enough to allow the president-elect to attend the California State PTA Convention held in late April/early May (Article V, Section 9) and meet the council/district deadline for directory data (Article VI, Section 1e).
  - e. Article VI, Section 2 (p. 7) – Use this section for an executive vice president, or a vice president if there is no executive vice president and only one vice president.
  - f. Article VI, Section 4 (p. 8) and Section 5 (p. 8) – If there is only one secretary, line out corresponding secretary and combine these sections and renumber subsequent sections.

- g. Article VI, Sections 6b (p. 9), 6l (p. 9), and 6m (p. 9) – If out-of-council, line out ONLY the last sentence, substituting the italicized sentence that follows.
- h. Article VI, Section 8b-d (pp. 10-11) – The mid-year audit is required approximately halfway through the fiscal year. The year-end audit must be completed immediately following the end of the fiscal year. (For example, if the fiscal year ends June 30, the year-end audit must be completed in July. The mid-year audit would be completed in December or January.) A third audit is required at the end of the officer term of office when the term of office is different from the fiscal year.
- i. Article VI, Section 8b-d (pp. 10-11) – The months for adoption by the association must agree with association meeting months in Article VII, Section 1 (p. 13).
- j. Article VII, Section 1 (p. 13) – Set the first meeting of the school year early enough to assure that the PTA program and budget are approved by the association *prior to* beginning PTA programs or expending PTA funds (Article VII, Section 3).
- k. Article VII, Section 2 (p. 13) must agree with Article V, Section 3g (p. 5) and Section 7 (p. 6) and Article VII, Section 1 (p. 13). Set the election month early enough to allow the president-elect to attend the California State PTA Convention held in late April/early May (Article V, Section 9, p. 6) and to meet the council/district deadline for directory data (Article VI, Section 1e, p. 7).
- l. 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), 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 is a combination of ten (10) or more standing committee chairmen and/or appointed, voting directors or specialists, that number will be divided by two (2) and added to the association quorum.
- m. Article VIII, Section 1 (p. 14) – Standing committees are those committees that function all year, e.g. hospitality, membership, program, ways and means, fundraising, etc. Standing committees are listed in Standing Rule #10.
- n. Article VIII, Section 2c (p. 14) – Guidelines for the expenditure of unbudgeted funds is as follows (**California State PTA Toolkit**, Finance section, Unbudgeted Expenditures):
  - i. Eight or more association meetings per year – up to \$500.00
  - ii. Five to seven association meetings per year – up to \$750.00
  - iii. Four or fewer association meetings per year – up to \$1000.00
- o. Article VIII, Section 7b (p. 16) – The 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.
- p. Article X (p. 18) – Consult with council parliamentarian to verify agreement with council bylaws.
- q. Article XIII (p. 20) – Attach copy of articles of incorporation, if an incorporated association.
- r. Article XIV (p. 21) – Associations are required by law to have a federal Employer Identification Number (EIN), and a state Franchise Tax Board (FTB) number and Registry of Charitable Trust (CT) number, and are required to file annual forms with the appropriate agency. Insert the corporation number if the association is incorporated. Contact your district PTA for assistance.
- s. Standing Rules (p. 23 and following) must be attached and may not conflict with or supersede bylaws. Do not restate bylaws or **Toolkit** sections in the standing rules.