PTA BYLAWS REVIEW

4 KEY STEPS

Step 1: Getting 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 eBylaws Program to update bylaws

Please be advised that currently the only bylaws version available in our eBylaws Program is the English version

- Reviews current bylaws prior to the meeting
- Provides copies of current bylaws for bylaws committee members

Bylaws Committee:
- Reviews current bylaws to see if any changes are necessary
- Lists proposed amendments, including article, section and page number

Parliamentarian:
- Uses eBylaws Program to complete the proposed amendments and then downloads a PDF of the prepared bylaws document; or uses the fillable PDF to make proposed amendments and save a copy with the changes
- Prints double-sided, hard copy of bylaws to keep for unit reference

Executive Board:
- Reviews updated bylaws with proposed amendments, if any, at board meeting
- Votes to approve
- Secretary records outcome in Minutes

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Step 2: Submit Bylaws

Parliamentarian:
- Submits the bylaws through channels to be signed by the California State PTA parliamentarian
  a. If in council, email the PDF bylaws document to the council parliamentarian or other representative as designated by the council.
  b. If out of council, email the PDF bylaws document to the district parliamentarian or other representative as designated by the district.

Step 3: Adopt Bylaws

After approved bylaws are signed by the State Parliamentarian and returned to your unit through channels:

President:
- Puts adoption of bylaws amendments on agenda for next association meeting
- Notifies members of proposed amendments at least 30 days in advance of the meeting

Members:
- Vote to adopt bylaws at an association meeting, with a two-thirds (2/3) vote required

President and Secretary:
- Sign and date master set of bylaws for secretary to keep in their files
- Sign and date copies of bylaws for the president and parliamentarian

Step 4: Complete Process

Parliamentarian:
- Upon adoption of the bylaws, the unit parliamentarian will:
  - Send confirmation of adoption via signed and dated bylaws through channels to the council and/or district (ask your council and/or district about special requirements)
  - Make copies of bylaws for executive board members
  - Upload the adopted bylaws – including completed signature page – in one pdf file to the "Document Management" section in MyPTEZ.

Additional Bylaws Resources & Information
- leaders.capta.org/leadership/bylaws-and-standing-rules
- leaders.capta.org/leadership/ebylaws

Did you know that there's a fast and easy way to update unit bylaws? Use the California State PTA's eBylaws program online!

eBylaws

STAGE 1 – Before using eBylaws, you'll need to get a user name and password:
- Sign-in/Register for leaders.capta.org. Click "Leadership/Bylaws," and then "Standing Rules/eBylaws." This will take you to leaders.capta.org/leadership/ebylaws.
- On the eBylaws home page, click on "Request a Username & Password" button.
- Fill in the form with your name, contact information, and user type. If you are not a parliamentarian, select "assistant." Click "Next".
- Select your PTA district number/name, and then your PTA council name. Enter your school/unit name, city, and the California State PTA ID number found on the front cover of your current bylaws. Reach out to your council or district if you need help.
- Enter a username of your choice (all lowercase) and make sure to write it down! Click "Next," followed by "Submit."
- You will receive an eBylaws password in three to five days, and you'll be ready to prepare bylaws!

STAGE 2 – Once you have a password, go online to eBylaws (www.ebylaws.capta.org):
- Go to capta.org/pta-leaders/services/ebylaws/ and click "Access eBylaws," then log in with your username and password.
- Click on your unit name in the listing.
- The first screen is the "Unit Information Record." Information on this page can only be entered or changed by California State PTA. If this information is complete and correct, click "Next." If the information is incorrect, please contact your district for assistance.
- Move through each screen, confirming or changing information as needed.
- Click "Save" often as you navigate through the process; this can show you where there may be problems that need correction (areas needing correction will be outlined in red on the specific page.)
- When you reach the final screen, click "Save" one final time. A green notification box will appear in the top right corner if no corrections are needed. If red notifications appear, the process is incomplete, and corrections are still needed.
- Once the bylaws are complete, click on the "Bylaws" button to generate and download a PDF file of the bylaws. Make sure to review the document!
- If there is a DRAFT watermark on the bylaws document, there is something that must be corrected before submission through channels. Go back into eBylaws and go through each screen, looking for information boxes outlined in red. Hover over the outlined areas for guidance to correct the issue. Once they are corrected, click on the "Bylaws" button to download a new PDF file of the bylaws.

STAGE 3 – Prepare your bylaws for submission:
- Review each page of the bylaws PDF to make sure information is correct as submitted in eBylaws and as intended.
- Complete a Bylaws Submittal Form and include it with the bylaws in the submission to the council, if in council, or to the district. The Bylaws Submittal Form can be downloaded from the California State PTA Toolkit, found at toolkit.capta.org.