

Unit Bylaws Review Checklist

- Confirm bylaws are an original set using the current standard bylaws template.
- Confirm bylaws have been completed using black or blue ink or a typewriter.
- Using Unit Information Report, confirm: ID numbers; complete legal name of PTA, council, and district; and organization date. Note any discrepancies for follow-up and correction and complete Change of Status form for name change, transfer, address change, and/or grade change, when necessary. If unit is listed as Z-Pending on Unit Information Report, complete Change of Status form to transfer to out-of-council.
- Review list of proposed amendments for appropriateness.
- Confirm general compliance with instructions on page(s) i – iii. No amendments are permitted to starred articles and/or sections except as noted by italicized words. Review for completion of all blanks, line-outs as appropriate, no use of white-out, bracketed instructions lined out, words spelled out, article and section agreement as appropriate.
- Article I - Name
 - Use of complete legal name of PTA and council (or listed as out of council)
 - District number spelled out
- Article IV – Membership and Dues
 - Amounts spelled out and stated as numbers
 - Family/staff/student memberships use appropriate language (contact state parliamentarian for assistance)
 - Out-of-council sections used or lined out appropriately
 - Deadlines and amounts agree with council and/or district bylaws
- Article V – Officers and Their Election
 - Officers listed or lined out as appropriate; Section 2 agrees with sections in Article VI
 - Section 3(g) agrees with Section 7 and Article VII, Sections 1 and 2; election month allows president-elect to attend state PTA convention per Article V, Section 9
 - Appropriate officers lined out in Section 5(b)
 - No PTA or PTSA lined out in Section 6
 - Term of office corresponds with fiscal year in Article XIV to simplify financial reporting (when possible)
 - Appropriate words lined out in Section 12
 - Section on nomination by petition inserted for incorporated PTAs (contact state parliamentarian for assistance)

- ❑ Article VI – Duties of Officers
 - Appropriate sections lined out if not listed in Article V, Section 2
 - Date in Section 1(e) agrees with council deadline, if in council, or district deadline
 - Number of vice presidents correspond with Article V, Section 2 and titles appropriate and spelled out – principal may not serve as officer
 - Recording, corresponding, and financial secretary sections combined and subsequent sections renumbered, as appropriate
 - Section 4d and Section 6e agree
 - Check signatures are elected officers other than secretary, auditor, or signer of authorizations for payment – principal may not sign checks
 - Audit months correspond appropriately with term of office and fiscal year, audit reports correspond with association meeting months (for any special circumstance, contact state parliamentarian before submission)
 - Sections renumbered appropriately

- ❑ Article VII – Association Meetings
 - Specific week, day of month, and months stated in Section 1
 - First meeting should be early in school year to approve budget and program
 - Election month listed in Section 2 allows president-elect to attend state PTA convention
 - No changes made to established wording in Sections 1, 2, 4, 5, 6, or 7
 - Minimum quorum guideline met or exceeded (correct or contact state parliamentarian prior to submission for any exception to guideline). Minimum quorum is 11; however, if executive board is ≥ 10 , minimum quorum should be high enough to assure general member participation.

- ❑ Article VIII – Executive Board
 - Amount for unbudgeted bills meets following guidelines:
 - Eight or more association meetings per year – up to \$500.00
 - Five to seven association meetings per year – up to \$750.00
 - Four or less association meetings per year – up to \$1000.00
 - Section 5 left intact
 - Minimum quorum guideline met or exceeded, including principal and teacher representative (correct or contact state parliamentarian prior to submission for any exception to guideline)
 - Unincorporated units line out Section 2(h)

- ❑ Article IX – Committees
 - Term(s) of office in Section 3 completed appropriately

- ❑ Article X – Council Membership
 - Completed for all units in council; lined out and subsequent articles renumbered for out-of-council units
 - Corresponds with council bylaws (this is the council and district parliamentarian’s purview)

- If there are delegates stated in Section 1(a), then Sections 1(b), (c), and (d) completed
 - Delegates selected in association meeting month prior to first meeting of council
 - Council dues agree with Article IV, Section 4; council assessments may also be listed here
- Article XIII – Articles of Organization
 - Line out paragraph that does not apply
 - Incorporated units have attached Articles of Incorporation along with cover sheet
 - Article XIV – Fiscal Year and Identification Numbers
 - Fiscal year remains constant; any change requires notification of state PTA treasurer and IRS
 - ID numbers and EIN correspond with cover and Unit/Council Information Report; resolve EIN discrepancies with unit/council treasurer and report to state membership clerk
 - Corporation number entered and confirmed, when appropriate (see www.ss.ca.gov)
 - Signature page
 - Complete legal names of all PTAs
 - PTA secretary signed and dated for newly organized PTAs only
 - Standing Rules
 - Submitted
 - Do not conflict with or restate bylaws
 - Do not conflict with PTA procedures in *California State PTA Toolkit*
 - Council parliamentarian: Keep one copy of submitted bylaws for reference; mail remaining sets to district parliamentarian.

District parliamentarian: Separate signature pages from remaining copies of submitted bylaws. Be sure both sides of page (pp.23-24) have been copied. Keep one copy of the submitted bylaws for reference in the event the state parliamentarian contacts you with questions. Paperclip signature pages to original set of bylaws. Complete and paperclip bylaws submittal form (January 2005) to original set of bylaws, if not already attached. Mail to state parliamentarian.