



# **BYLAWS WIZARD FOR REGION CHAIRS AND REGION DIRECTORS**

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# BYLAWS NOTES TO REMEMBER

- Bylaws must be renewed every three years for units & councils to maintain “Good Standing” status.
- Process requires reviewing / updating and approval by 2/3 of the members and NYS PTA approval. Members must be given 30 days notice of the meeting to adopt new bylaws.
- *Units and Councils can only use the Bylaws Wizard process.*

# NOTES TO REMEMBER

- No more than three amendments may be made to existing bylaws within the three year period. The *bylaws amendment form* is available on the NYS PTA website.
- No amendments may be made on bylaws that are within 90 days of the expiration date.
- Changes in mandated articles and sections are voted upon by delegates at the National PTA and New York State PTA conventions and automatically become part of bylaws. Unit or council members should be aware of changes in mandated sections.

# NOTES TO REMEMBER

- Bylaws are valid for three years from the date of approval by the New York State PTA Bylaws Coordinator.
- They expire four times per year- January, April, July and October.
- They can be reviewed at any time and be resubmitted. However, every three years they must be sent, whether revised or not, 30 days prior to the date of expiration to the Region Bylaws Chair or, in the Chair's absence, to the Region Director


# REGION BYLAWS CHAIR REVIEW PROCESS

- When a Unit or Council bylaws are due for revision, please send the appropriate form letter to the unit or council that their bylaws are due to expire.
- This letter should include your contact information (including your mailing address) and instructions on how they can renew their bylaws. All this information is available to you through the Bylaws Quick Link on the home page of the new IDL.

- You will receive an email notice that a unit has submitted their new or amended bylaws
- The link should take you directly to the summary page for that unit, or you can go directly to the portal at [nyspta.force.com/login](https://nyspta.force.com/login)
- You can find recently submitted bylaws by looking at the *Bylaws Awaiting Region Approval* queue
- Once you have located the bylaws hit “edit” and take a look at the information listed
- Make a note in the notes section if something needs to be received, such as cover page or adoption date or if you need to confirm an item on


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Bylaws Approval Request - 05-324 Selden Middle School PTA Inbox x [Print] [Share]

 **NYS PTA Portal Site Guest User** donotreply@nyspta.org via bsmj9hr0sbf1.36-ppbpeai.na30.bnc.s to me ▾ May 21 ☆ [Reply] ▾

Bylaws have been submitted by 05-324 Selden Middle School PTA and are awaiting approval.

To approve or reject, click this link and log in to the NYS PTA portal:  
<https://nyspta.force.com/login?retURL=/a0T3600000QYRsZ>

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- Input date on Wizard for all bylaws front cover pages received by you.
- Wizard Review – you will only receive the Cover sheet of the bylaws from the unit/council, signed by the president and secretary and should include the membership adoption date.
- You first check to make sure that the bylaws code stamp on the cover sheet matches the bylaws code stamp on the bylaws in your queue in the Sales Force Portal.
- If they match, you can move forward with the review and then sending them electronically to the NYS PTA Bylaws Coordinator for approval.
- If they do not match, you will contact the unit/council to see what may have happened.



- If not already listed, input the Membership Adoption Date listed on the Cover Page into unit summary page (always remember to hit *save* when you make a change and *generate new document*)
- When your review is completed, you scroll down to the bylaws and hit ‘approve’. These bylaws will now be placed in the *Bylaws Awaiting State Approval* queue
- You are the only one to have this signed cover sheet so you **MUST** file this with the unit’s bylaws in your folder in the event it is needed for verification at some point

- You have the option to “Reject” bylaws if they are test copies, duplicates or ones that should not be submitted
- You can print or download and save a copy to keep in your file until the bylaws are approved by the NYS PTA Bylaws Coordinator
- The NYS PTA Bylaws Coordinator will approve the bylaws by entering the date of approval, the date of expiration and electronic signature
- An email will then be sent to the person from the unit or council who submitted the bylaws with an approved copy

## **ONCE APPROVED BY NYS PTA BYLAWS COORDINATOR:**

- An email will then be sent to the person from the unit or council who submitted the bylaws with an approved copy
- To check if a unit's bylaws have been approved you can go back to the State approval queue and see if they are still listed
- A unit may request a copy of bylaws from you as they no longer have access to them on the portal
- Your Region Director will instruct you on how they would like these bylaws documents saved

**THAT'S IT ~ YOU ARE FINISHED!**

# UNIT CHANGE OF NAME PROCESS

**The process for a name change to bylaws is as follows:**

Send to the NYS PTA Bylaws Coordinator:

- a) A copy of the minutes that show that the unit/council voted to approve the name change.
  - b) A copy of the old bylaws Cover Page with the old name listed.
- The NYS PTA Bylaws Coordinator will then contact the NYS PTA office to have the name changed on the bylaws
  - The NYS PTA Bylaws Coordinator will then contact the region bylaws chair to inform the unit/council that they can go online to complete their bylaws, so that the new name prints out on the Cover Page.

- The documents must then be sent to the NYS PTA financial specialist who will contact the IRS and NYS Tax Department to complete the change

# Region Bylaws Chair – New Charter Responsibilities

- The RD will contact the office for a new unit code
- The unit's bylaws committee will go in to the wizard to complete the bylaws – make sure that they have your contact info for questions
- Go to the unit's bylaws record to review it before the charter meeting
- Once the charter meeting is done, have the signed and dated cover page sent to you by the Region Director

- Go back in to the record, put in the adoption date and approve the bylaws
- The financial specialist and the office will update the FEIN #, NYS Tax ID and the National PTA Code for the unit
- Once this information is available, the bylaws need to be re-entered online so that

# REGION BYLAWS MANUAL REVIEW PROCESS

## **Review and adoption:**

- Region bylaws must be reviewed every three years.
- New fillable Region bylaws template on IDL.
- Present to Region Board for approval.
- Once approved, they must be presented to the delegate body for a vote. (This is usually done at your annual meeting-Spring Conference)
- Email or mail the approved bylaws, and mail the signed front cover page to Bylaws Coordinator, who will review, approve and sign.
- A final approved copy of the bylaws will be placed on IDL in the Region Bylaws folder by the NYS PTA Bylaws Coordinator.



# Questions?

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