



# BYLAWS WIZARD TRAINING FOR UNITS AND COUNCILS

Presented by:



## WHY DO WE NEED BYLAWS THAT ARE UP TO DATE?

\*Bylaws allow us to conduct meetings in an orderly and fair manner

\*If Bylaws are expired:

1. Units will not be eligible for PTA grants or awards (this can directly impact your staff, students and members)
2. Units may not be able to participate in PTA programs (PARP, Reflections)
3. A unit would not be able to be able to submit a resolution and members cannot be voting delegates at convention

# BYLAWS PATTERN

- The bylaws patterns have been simplified and standardized with the following:
  - Officers shall assume their official duties on July 1
  - The Nominating Chair is elected by the Nominating Committee
  - Officers shall serve for no more than two (2) consecutive one year terms (or one two-year term)
  - Fiscal Year is July 1 – June 30
  - Special Meetings of the executive committee and executive board may be called and at least 2 days' notice shall be given.
  - Special Meetings of the Association may be called by the President, a majority of the executive board, or upon written request of 30% of the membership. At least 5 days' notice shall be given.
- BYLAWS WIZARD optimized for speed through the entire process
- Bylaws Wizard checks for required limits and provides required wording



## BYLAWS NOTES TO REMEMBER



- Bylaws are valid for approximately three (3) years from the date of approval by the New York State PTA Bylaws Coordinator.

*Depending on when they are submitted and approved. They will expire 3 years later on Jan, April, July or October 1<sup>st</sup>.*

- They can be reviewed at any time and be resubmitted. However, every three years they must be reviewed and entered into the Bylaws Wizard, whether revised or not, then voted on by the unit at a regular meeting of the organization as long as at least 30 days notice was given
- To adopt the bylaws, you must do this at a general membership meeting with a quorum present and you must have a 2/3 vote of the members present and voting
- Once adopted, ***the original signed cover page must be sent via mail or email to the Region Bylaws chairman*** or in the absence of a chair to the region director  
Please make sure **adoption date** is included.
- Units and Councils must use the Bylaws Wizard to create and/or amend their Bylaws

# Bylaws Quick Links on NYS PTA website

[Region Chairmen](#)

[Steps to Revising Bylaws \(PDF\)](#)

[Unit Bylaws Wizard Instructions \(PDF\)](#)

[Council Bylaws Wizard Instructions \(PDF\)](#)

[Instructions for Unit Bylaws Wizard Amendments \(PDF\)](#)

[Bylaws Amendment Notification Form \(Word\)](#)

# BYLAWS WIZARD PROCESS

- When your bylaws are due for revision, you will receive a notification from your Region Bylaws Chairman
- This letter/email should include your RBC's contact information and instructions on how to renew your bylaws
- Form a bylaws committee of 3-5 members to review your current bylaws
- Go to the NYS PTA website home page at [www.nyspta.org](http://www.nyspta.org)  
Click on Leaders then go to bylaws/procedures
- On the top of this page is **the Bylaws Wizard Button** – click on it to begin

# Welcome to Bylaws Wizard

This process should take  
no more than 15 minutes to complete

It is advisable to have a copy of your current bylaws for reference during the process

- **Unit and council code** – you must enter your unit or council code to begin - this number is on the first page of your current bylaws
- **Enter your first and last name and email address** – This information is needed in order to send you a copy of your submitted bylaws
- **New Bylaws/ Amendment** – Check if you are renewing your bylaws (**new**) or simply making amendments to your bylaws – amendments cannot be made if your bylaws are due for renewal within 90 days
- **Unit/Council Information** – Check if the information provided is correct. If not, please make corrections in the box on the next page\*\*  
(contact the Region Chair for assistance)

**\*\*Unit or Council name changes can only be handled through your region bylaws chairman**



Next

Enter your New York State PTA unit or council code (xx-xxx):

First Two Digits	<input type="text" value="00"/>	?
Last Three or Four Digits	<input type="text" value="000"/>	?

Next



# BYLAWS WIZARD PROCESS

- **Membership Adoption Date** – if your bylaws have not yet been voted on, leave this blank
- **President and Secretary** – put in the names of your current president and secretary
- **Dues Information** – Fill in the annual dues of your association. The total amount is determined by a vote of the association. Each member's dues must be at least **\$4.00**. You must fill in an amount of at least **\$4.00** for each of the choices (reminder that additional family member is NOT a family membership).

# BYLAWS WIZARD PROCESS

- **President Structure** -Please select the type of president structure that your unit will use.

A President is the recommended option, but Co-presidents or a President with a President Elect (*in this case, a unit will never vote on any candidate for the office of president, but will elect a president-elect and the other officers of the association*) are acceptable alternative structures.

**The minimum number of officers are three (3): a president, a secretary and a treasurer. No person can hold any two of these positions.**

# BYLAWS WIZARD PROCESS

- **Vice President Structure** – Enter number of vice presidents and then the vice president structure:
  - Designated Order (1st, 2nd etc.)
  - Job Title (VP of Legislation, etc.)
  - At Large (*order and duties determined in accordance with unit Procedures*)
  - If no VP enter 0 (zero)



# BYLAWS WIZARD PROCESS

- **Secretary** – PTA units can have either a single secretary or a recording and a corresponding secretary.
- **Treasurer** – The Treasurer position is automatically entered.
- **Officer Term** – Officers may serve for a **maximum** of two consecutive **one-year terms** in the same office, or no more than **one, two-year** term. Please select one of these options.



# BYLAWS WIZARD PROCESS

- **Nominating Committee** – You must specify the number of nominating committee members (an odd number), the number from the Executive Board, the number from the Association, and the month of the annual meeting.
- **All members of the Nominating Committee must be elected. The chairman of the Nominating Committee shall be elected by the Nominating Committee.**
- Choose to have an alternate elected member.
- Choose the month the Election Meeting will be held.
- Choose the month the Annual Meeting will be held.



## BYLAWS WIZARD PROCESS

- **Additional Nominations** – Check the appropriate box for the following selection to be added:
- Additional nominations may be made from the floor provided the written consent of the nominee has been secured and the chair of the nominating committee has received notice at least two business days prior to the election meeting of the candidate's intention to run.
- *Additional Nominations can always be made from the floor, by choosing this option it helps the unit to plan for an election knowing there will be need to be a ballot vote for an office.*

# BYLAWS WIZARD PROCESS

- Choose when the nominating committee will ***publish*** its' report
- **Executive Committee** – consists of the elected officers of your unit. You may include, Immediate past president - if available
- **Executive Board** – consists of the executive committee, council delegates and chairmen of standing committees of your unit. You may want to include possible additional members:
  - The immediate past president - if not on Executive Committee.
  - The Principal/Director (or other administrator)
  - Teacher Liaison(s)
  - Parliamentarian (a non-voting member)
  - Student Rep
  - Historian
  - Building Directors/Representatives – Central PTAs and SEPTAs
- ***Council Delegate(s) – Whether elected at the same time and same manor as the officers, appointed by the president/executive committee or elected by the executive board, the council delegate(s) will be on the executive board and not on the executive committee as they are not officers.***

# BYLAWS WIZARD PROCESS

- **Council** – If the PTA unit is a member of a council, key in the number of delegates to the council and how they are selected (choose one):
  1. nominated and elected by the same method and at the same time as the officers of the association.  
*(Delegates although they may be elected are not officers but are part of the executive board)*
  2. appointed by the president in cooperation with the executive committee.
  3. elected by the executive board
- **Meetings/Quorum** –A quorum is the minimum number of members who must be present at a meeting before any business can be transacted. The quorum should be 2 times the number of officers  
**The quorum must always be at least (10) ten.** It is the responsibility of the members of the association to attend meetings and vote on actions



# BYLAWS WIZARD PROCESS

Please review and confirm your responses. When you click 'Next', your bylaws document will be generated and submitted for approval.

*A copy of the document will be emailed to the address you provided.*

## Last Page of Bylaws Instructions for completion

**Your bylaws document is being generated and a draft copy will be emailed to you.**

**HOWEVER, YOU ARE NOT FINISHED, PLEASE READ BELOW!**

**After the bylaws are voted on, you MUST send the signed cover page to your Region Bylaws Chair to start the approval process.**

### **PLEASE PRINT THESE INSTRUCTIONS!**

- Review your new bylaws document that was just emailed to you
- If you find anything that needs to be changed, please email your Region Bylaws Chair ([email addresses available HERE](#)) and they will make the necessary changes for you and resend you a new draft copy.

## **DO NOT GO THROUGH THE WIZARD A SECOND TIME TO AVOID DUPLICATE RECORDS**

- If everything looks as expected, print your bylaws document
- With 30 days' advance notice, present the bylaws document to your Membership for a vote
- If approved, fill in the Adoption Date on the cover page
- Gather the appropriate signatures and send the signed cover page to your Region Bylaws Chair via email or in the mail
- If processing an Amendment, be sure to include your completed [Amendment Form](#) as well

Once approved by the region and the state, you will receive the APPROVED bylaws document via email to save electronically and to print and have available for your members.

### **VERY IMPORTANT**

**Your Bylaws cannot be approved until your signed cover sheet is received by your Region Bylaws Chair! If not completed within 6 months, this bylaws record will be deleted and you will need to start the process over!**

# BYLAWS WIZARD AMENDMENT PROCESS

- This process will be used if your unit or council decides that your bylaws need an amendment (such as a change in dues, number of VPs etc.) but are not close to the expiration date.
- Amendments may be submitted only if your bylaws have been approved by the New York State PTA within the last three (3) years.
- **No amendments may be made on bylaws that are within 90 days of the expiration date.**

**NOTE:** *All provisions denoted with an asterisk (\*) indicate compliance with the National PTA Bylaws. Those with a hash tag (#) are common to New York State PTA and its constituent associations and can not be changed by the unit or council.*

*Any changes to these provisions 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.*

# AMENDMENT PROCESS CONTINUED

- **Only three (3) amendments can be submitted.** Each individual change is considered an amendment.
- If bylaws require *more* than three changes, a revised set of bylaws must be submitted.
- In some cases an amendment can change the bylaws in other places. This may cause the bylaws to require more than three changes. If this happens a new set of bylaws must be submitted.
- Amendments that are additions or revisions (changes) to the bylaws must be consistent with existing bylaws.\*\*

\*\*your region bylaws chairman may contact you for clarity on changes that may seem inconsistent with your current bylaws

# AMENDMENT PROCESS CONTINUED

- Print an Amendment Form from the NYS PTA Website.
- On the left-hand side write in what currently exists in your bylaws and then on the right-hand side, write in your proposed amendments.
- Using the “Bylaws Wizard” button, go through the wizard and enter everything the same as before except for the amendments you are proposing.
- Once you completed the Bylaws Wizard, your bylaws are submitted electronically to the region for approval and a document draft is emailed to you.

## AMENDMENT PROCESS CONTINUED

- If you find any mistakes in your document, PLEASE DO NOT GO THROUGH THE WIZARD A SECOND TIME TO AVOID DUPLICATE RECORDS. Contact your Region Bylaws Chair who can make changes on your behalf and resend your document draft.
- After your Amendment is voted on by membership and adopted, you will need to mail or email the signed Amendment Form AND the signed Bylaws Cover Page to your Region Bylaws Chair to start the approval process.
- Once approved by the Region, the document is sent to the State Bylaws Coordinator for review and approval.
- Once approved by the State, you will receive a Signed Approved Bylaws document.\*\*

**\*\* Amendments to bylaws DO NOT change the expiration date of the bylaws**

# COUNCIL BYLAWS

- Begin the process by going to the Bylaws Wizard
- Put in your name and email and check to see if your council information is correct
- Name of officers and adoption date
- Council dues structure – you can choose one amount for all units, or different dues for each type of unit
- Delegates from member units – You have the option for a fixed number of delegates or a different number for each type of unit (this is the maximum allowed from each unit, the actual number the unit sends up to the maximum is dependent on the unit's bylaws)

Officer structure – Pres/Co-Pres, number of VPs, etc.

Term of Office

Nominating committee – One member from each member unit or Number of members elected from the voting body  
(total must be an odd number)

Executive Committee – you may include the immediate past council president

Executive Board – choices:

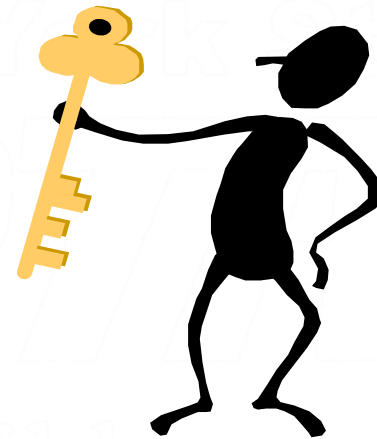
- \*President of each member unit                      \*historian
- \*Immediate Past president                      \*council delegates
- \*Superintendent                      \*School board Liaison
- \*Teacher Liaisons                      \*Parliamentarian



- Please Review your choices
- Your bylaws document will be sent to you electronically via email and to your Region Bylaws Chairman
- If you find any errors, contact your RBC for help
- Council bylaws must be presented to each member unit at their unit meeting and approved by a 2/3 vote
- At the council meeting, these must be approved by 2/3 of the member units present and voting

- Once approved by the council, the signed cover sheet **MUST be sent to the Region Bylaws Chairman** *(you can email or mail the copy)*
- Once approved by the NYS Bylaws Coordinator, the approved bylaws will be sent to the council via email.
- All units in the council should receive an approved copy for their files

# QUESTIONS AND ANSWERS



NYS PTA Website [www.nyspta.org](http://www.nyspta.org)