



BYLAWS TRAINING FOR REGION CHAIRS AND REGION DIRECTORS

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NOTES TO REMEMBER

- Bylaws must be renewed every three years for units & councils to maintain “Good Standing” status.
- Process requires review & update by the unit/council.
- All forms and instructions needed are located on the NYS PTA website on the Leaders tab, then go to Bylaws page.
- Members must be given 30 days notice of the meeting to adopt new bylaws.
- Bylaws must be approved by 2/3 of the members present and voting (a quorum having been established). **This must be a GENERAL MEMBERSHIP MEETING - Not a Board or Executive Committee Meeting**

Units and Councils can only use the Bylaws Wizard process. There is a separate process for Region bylaws renewal.

NOTES TO REMEMBER

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

NOTES TO REMEMBER

- **Mandated articles and sections cannot be amended by the unit/council.**
- **Changes to mandated articles and sections can only be made by a vote of delegates at the National PTA or NYSPTA conventions and automatically become part of bylaws.**
- **The New York State Bylaws Committee can recommend changes to unit & council bylaws general patterns that are for the purposes of clarity and do not change intent or any sections that are editable by the unit or council. This recommendation is approved by the NYSPTA Executive Committee and reviewed by the Parliamentarian before changes are implemented.**

BYLAWS WIZARD PROCESS FOR RBC's

- If you are a new RBC, the previous Region chair will pass on the generic email address to you, and you should change the password.
- Check your Region bylaws report on a regular basis for information
- When a Unit or Council bylaws are due for revision, send the appropriate *form letter* to the unit or council that their bylaws are due to expire **no less than 90 days prior to expiration.**
- This letter should include your contact information (including the region generic bylaws mailing address) and instructions on how they can renew their bylaws.
(these fillable letters are available on the Region Board Givebacks site under Region Boards (All)- Communications- Shared Files or email the coordinator for a copy)

- There are additional letters on Givebacks for expired bylaws and reminders to send the cover sheet to the RBC
- ***If Bylaws are expired more than 90 days***, the office will send out a letter to the president as a reminder (with a “cc” to the RD) – it is imperative that you work with your Region Director to do your best to get these units to begin the Bylaws process

A unit with expired Bylaws would be ineligible for awards and grants. They would also risk possible dissolution of the unit if they do not comply within a reasonable amount of time

Process continued

Once a unit or council creates bylaws using the wizard, they receive a copy via email of the “proposed” bylaws for review by their membership.

You will receive an email from NYS PTA Portal Site with a link to the proposed unit/ council bylaws.

The email link will take you to your sign in page, then directly to the bylaws detail page for the new bylaws.

Bylaws Detail		Edit	Submit for Approval	Amendment Form
Unit or Council	12-373 Fonda Fultonville Central School PTSA	Record Type	Unit Bylaws	
Type	New Bylaws	Submitted Date	5/7/2024	
Approval Status	Approved by State	Approval Date	5/31/2024	
Approver	Northeastern Bylaws Chair	Expiration Date	7/1/2027	
Cover Page Received	5/22/2024			
Issues to Resolve	RBC Verified w/secretary- removed Immediate Past President from the Executive Committee.			
Generate Updated Bylaws Document	<input type="checkbox"/>			



Process continued

You will also find the bylaws in the *Bylaws Awaiting Region Approval* queue in Salesforce. To sign in to Salesforce, go to <https://nyspta.my.site.com/login/> On the Home page, Click on the Bylaws tab, then Click on the GO button to go to the list of your Region's bylaws awaiting approval.

Home My Region Organizations Forms **Bylaws** Reports

Recent Items

- Welcome Region Director OR Region Bylaws Chair
- Click **BYLAWS** tab above and then select "Bylaws Awaiting Region Approval" from the drop down and click GO - Be sure to edit the "Issues to Resolve" field to let us know the unit has been contacted

Bylaws Home

View: **Bylaws Awaiting Region Approval** Go!

Recent Bylaws Create New Bylaws Recently Viewed

Bylaws #	Record Type	Type	Submitted Date	Approval Status	Approval Date
Bylaws-6256	Council Bylaws	New Bylaws	2/5/2024	Approved by State	2/8/2024
Bylaws-6465	Unit Bylaws	New Bylaws	6/21/2024	Submitted	
Bylaws-6408	Unit Bylaws	New Bylaws	5/13/2024	Approved by Region	

This is a list of unit/council bylaws that have been entered in the Bylaws Wizard and the RBC is waiting for verification of changes, signed front bylaws page, etc.



Bylaws Awaiting Region Approval ▾



New Bylaws

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Bylaws # ↑	Unit or Council	Submitted Date	Type	Cover Page Received	Issues to Resolve
Edit	Bylaws-6390	12-070 Galway PTSA	5/2/2024	New Bylaws		No changes made from previous bylaws.
Edit	Bylaws-6408	12-374 Johnstown Junior Senior High School PTSA	5/13/2024	New Bylaws		
Edit	Bylaws-6413	12-156 Scotia Glenville Middle School PTA	5/14/2024	New Bylaws		Verified with president- Dues increased to \$8 f
Edit	Bylaws-6414	12-038 Delaware Community School PTA	5/15/2024	New Bylaws		
Edit	Bylaws-6453	12-310 Scotia-Glenville High School PTSA	6/5/2024	New Bylaws		RBC verified with president- officers term char
Edit	Bylaws-6454	12-115 Sand Creek Middle School PTA	6/10/2024	New Bylaws		
Edit	Bylaws-6461	12-362 South Colonie Special Education PTA	6/19/2024	New Bylaws		

Process continued

To access the previous bylaws, click on the name of the PTA unit/ council. Hover your cursor over “Bylaws” to get a list of all previous approved bylaws. Click on the most recent approved bylaws.

Organization
12-373 Fonda Fultonville Central School PTSA

[← Back to List: Bylaws](#)

[Issues \(3\)](#) | [Bylaws \(4\)](#)

Organization Detail [Edit](#) [Bylaws Wizard](#)

Organization Name	12-373 Fonda Fultonville Central School PTSA [View Hierarchy]
Type	Unit
Unit Code	12-373
Online Registration Link	https://nyspta.force.com/NewMemberRegistration?unit=12-373
Total Number of School Employees	

[Issues \(3\)](#) | [Bylaws \(4\)](#)

Bylaws [New Bylaws](#)

Action	Bylaws #	Record Type	Type	Submitted Date	Approval Status	Approval Date
Edit	Bylaws-6397	Unit Bylaws	New Bylaws	5/7/2024	Submitted	
Edit	Bylaws-4203	Unit Bylaws	New Bylaws	6/3/2020	Approved by State	1/11/2021
Edit	Bylaws-1915	Unit Bylaws	New Bylaws	3/22/2017	Approved by State	5/13/2017
Edit	Bylaws-0566	Unit Bylaws	New Bylaws		Approved by State	8/11/2013

Process continued

Write down the information in the previous bylaws to compare with the new proposed bylaws. Then click on “Back to List: Bylaws” and click on the Bylaws #.

[← Back to List: Bylaws](#)

[Notes & Attachments \[3\]](#) | [Approval History \[3\]](#)

Bylaws Detail [Edit](#) [Submit for Approval](#) [Amendment Form](#)

Unit or Council	12-373 Fonda Fultonville Central School PTSA	Record Type	Unit Bylaws
Type	New Bylaws	Submitted Date	6/3/2020
Approval Status	Approved by State	Approval Date	1/11/2021
Approver	Kim DiTonno	Expiration Date	1/1/2024
Cover Page Received	12/23/2020		
Issues to Resolve			
Generate Updated Bylaws Document	<input type="checkbox"/>		
Incoming New			
Merge incoming new	phrase needed to add to bylaws goes here		

▼ Bylaws Wizard Responses

Organization Info Correct?	Yes
Incorrect Info Details	
Membership Adoption Date	3/12/2020
President	Jennifer Henderson
Secretary	Michelle Rice

▼ Dues Amounts

Dues - Standard	\$5.00
Dues - Additional Family	\$5.00
Dues - Student	\$4.00
Dues - Teacher/Staff	\$5.00

Process continued

You will write down the information that is in the proposed bylaws and compare the previous and new bylaws for any changes. If there are changes made, you must contact the person who entered the bylaws or one of the officers to verify the changes are correct or incorrect. Verify the officers listed on the bylaws are the same officers in Givebacks. If not the same, contact the president to obtain the correct names.

Bylaws Detail		Edit	Amendment Form	
Unit or Council	12-373 Fonda Fultonville Central School PTSA		Record Type	Unit Bylaws
Type	New Bylaws		Submitted Date	5/7/2024
Approval Status	Submitted		Approval Date	
Approver	Northeastern Bylaws Chair		Expiration Date	
Cover Page Received				
Issues to Resolve				
Generate Updated Bylaws Document	<input type="checkbox"/>			
Incoming New				
Merge incoming new	phrase needed to add to bylaws goes here			
Bylaws Wizard Responses				
Organization Info Correct?	Yes			
Incorrect Info Details				
Membership Adoption Date	4/17/2024			
President	Jessica Gosson			
Secretary	Michelle Rice			
Dues Amounts				
Dues - Standard	\$5.00			
Dues - Additional Family	\$5.00			
Dues - Student	\$4.00			
Dues - Teacher/Staff	\$5.00			

Process continued

When you have received verification of the changes made, click on the Bylaws # and click on Edit.

Bylaws Bylaws-6397

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[Notes & Attachments \[1\]](#) | [Approval History \[2\]](#)

Bylaws Detail

 [Edit](#) [Amendment Form](#)

Unit or Council	12-373 Fonda Fultonville Central School PTSA	Record Type	Unit Bylaws
Type	New Bylaws	Submitted Date	5/7/2024
Approval Status	Submitted	Approval Date	
Approver	Northeastern Bylaws Chair	Expiration Date	

Process continued

Enter the changes made between the old bylaws and the proposed bylaws that you have verified into the Issues to Resolve box. You can also make any changes to the information entered if the unit made any errors entering the bylaws. Then click on Save.

Bylaws Edit Save Save & New Cancel

Information

Unit or Council	12-373 Fonda Fultonville Central School PTSA	Record Type	Unit Bylaws
Type	New Bylaws	Submitted Date	5/7/2024
Approval Status	Submitted	Approval Date	
Approver	Northeastern Bylaws Chair		
Cover Page Received	<input type="text"/> [5/29/2024]		
Issues to Resolve	<input type="text" value="Verified w/secretary- removed Immediate Past President from the Executive Committee."/>		
Generate Updated Bylaws Document	<input type="checkbox"/>		
Incoming New	<input type="text" value="--None--"/>		

Process continued

Dues Amounts

Dues - Standard	<input type="text" value="5.00"/>
Dues - Additional Family	<input type="text" value="5.00"/>
Dues - Student	<input type="text" value="4.00"/>
Dues - Teacher/Staff	<input type="text" value="5.00"/>

Officer Structure

President Structure	<input type="text" value="President"/>
Vice President Structure	<input type="text" value="One VP Only"/>
Number of Vice Presidents	<input type="text" value="1"/>
Secretary Structure	<input type="text" value="One Secretary"/>

Officer Term

Officer Term	<input type="text" value="Two Consecutive One-Year Terms"/>
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Nominating Committee

Nom Cmte Members from Board	<input type="text" value="3"/>
Nom Cmte Members from Association	<input type="text" value="2"/>
Total Nominating Committee Members	<input type="text" value="5"/>
Elect Alternate to Committee?	<input type="text" value="No"/>
Election Month	<input type="text" value="April"/>
Annual Meeting Month	<input type="text" value="April"/>
Additional Nominations?	<input type="text" value="No"/>
Nom Cmte Report Publication	<input type="text" value="One Month Prior to Meeting"/>

Process continued

Additional Executive Committee Members

Additional Exec Cmte Members

Additional Executive Board Members

Additional
Exec
Board
Members

Available

- Immediate Past President
- Principal or Other Administrator
- Teacher Liaisons
- Parliamentarian (a non-voting member)
- Student Rep
- Historian



Chosen

Central PTSAs

Number of Directors/Building Reps

Council Delegates

Actual Number of Delegates to Council

Delegate Selection

Quorum

Quorum

A unit's quorum must be 2 times the number of officers and no less than 10. For example, if a unit has co-presidents, 2 VP's, a recording and corresponding Secretary and a treasurer, they would have 6 officers and a quorum of 12 members.

Quorum	
Quorum	<input type="text" value="12"/>

To check if the unit is a member of a Council and to check how many delegates are listed in the Council bylaws, click on the Unit's name and look for the Council name under Additional Unit Details. If there is a Council listed, click on the Council name to go to the Council page.

Organization Detail		Edit		Bylaws Wizard	
Organization Name	12-240 Shenendehowa High School PTSA	[View Hierarchy]			
Type	Unit				
Unit Code	12-240				
Online Registration Link	https://nyspta.force.com/NewMemberRegistration?unit=12-240				
Total Number of School Employees	?				
<hr/>					
▼ Additional Unit Details					
Region	12-000 Northeastern	National PTA Number	00024827		
Sub-Region	00	Date Chartered	3/23/1988		
Council	12-703 Shenendehowa Council	Current Number of Buildings	1		
SEPTA Unit?	No	Grades	HighSchool		
		Bylaws Expiration Date	7/1/2025		

On the Council page, go to Bylaws then to the most recent approved bylaws. Scroll down until you see the section for Delegates. This is the number of delegates in addition to the unit president that each unit will enter in their bylaws. Each unit's number of delegates must match the number in the Council bylaws. If the number is incorrect or the unit has entered "0", you will enter the correct delegate number when you edit the bylaws for approval.

▼ Delegates

Delegates per Unit 2

Delegates per Elementary Unit

Delegates per Secondary Unit

Delegates per SEPTA Unit

Process continued

When you have received the signed front page of the new bylaws from the unit/council and the date that the unit membership or council delegates voted to adopt these bylaws (if the unit/council has not entered the date), you can now start the Region approval process. Click on the “Edit” button above the unit/council’s name.

Bylaws
Bylaws-6397

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[Notes & Attachments \[1\]](#) | [Approval History \[2\]](#)

Bylaws Detail

 [Edit](#) [Amendment Form](#)

Unit or Council	12-373 Fonda Fultonville Central School PTSA	Record Type	Unit Bylaws
Type	New Bylaws	Submitted Date	5/7/2024
Approval Status	Submitted	Approval Date	
Approver	Northeastern Bylaws Chair	Expiration Date	

Process continued

After you have reviewed the bylaws entry for accuracy, click on Save. On the next screen, scroll down to the bottom of the page and click on the Approve/Reject button.

System Information

Bylaws #	Bylaws-6397
Submitter First Name	<input type="text" value="Michelle"/>
Submitter Last Name	<input type="text" value="Rice"/>
Submitter Email	<input type="text" value="mrice0720@gmail.com"/>

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Region Approval (Pending for first approval)						Pending
Reassign Approve / Reject	5/7/2024 11:37 AM	Pending	Northeastern Bylaws Chair	Northeastern Bylaws Chair		
Approval Request Submitted						
	5/7/2024 11:37 AM	Submitted	NYS PTA Portal Site Guest User	NYS PTA Portal Site Guest User		

Always show me [fewer](#) ▲ / ▼ [more](#) records per related list

Process continued

On the next screen, click on the Approve button.

Approve/Reject Approval Request

Bylaws #	Bylaws-6397
Approver	Northeastern Bylaws Chair
Unit or Council	12-373 Fonda Fultonville Central School PTSA
Submitted Date	5/7/2024
Approval Status	Submitted
Issues to Resolve 	Verified w/secretary- removed Immediate Past President from the Executive Committee.
Comments	<div style="border: 1px solid #ccc; height: 100px;"></div>

Process continued

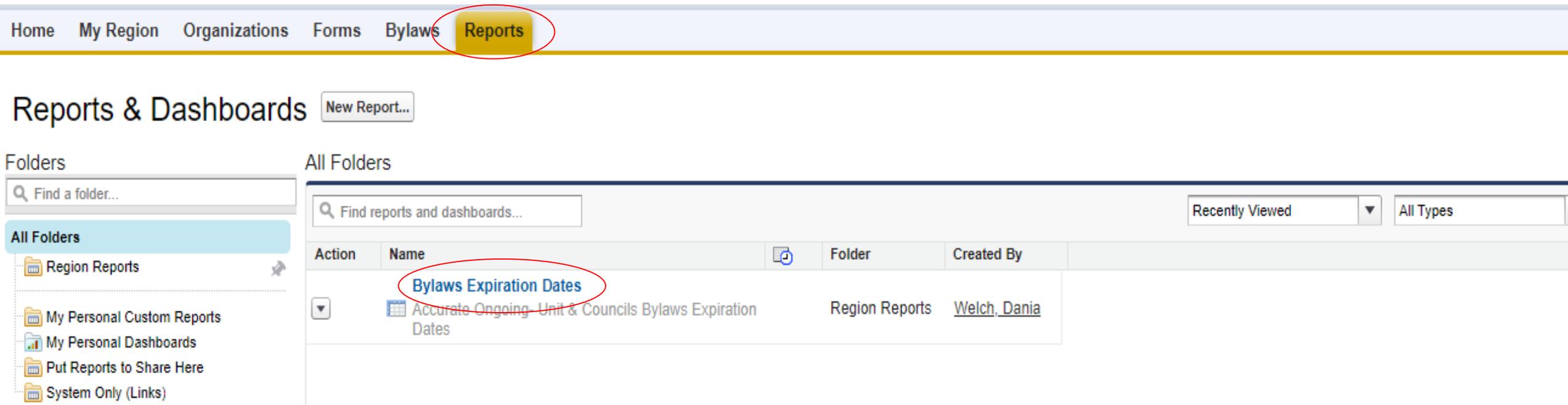
On the next screen, scroll down to the bottom of the page to see that the bylaws have now been submitted for NYS PTA Coordinator approval.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: State Approval (Pending for first approval)						 Pending
	5/29/2024 7:58 PM	Pending	Pat Assortato	Pat Assortato		
Step: Region Approval						 Approved
	5/29/2024 7:58 PM	Approved	Northeastern Bylaws Chair	Northeastern Bylaws Chair		
Approval Request Submitted						
	5/7/2024 11:37 AM	Submitted	NYS PTA Portal Site Guest User	NYS PTA Portal Site Guest User		

Always show me [fewer ▲](#) / [▼ more](#) records per related list

Process continued

To review the Region Bylaws Expiration reports, Click on Reports, then click on the Bylaws Expiration Dates link.



The screenshot shows the PTA website interface. At the top, a navigation bar contains links for Home, My Region, Organizations, Forms, Bylaws, and Reports. The Reports link is highlighted with a red circle. Below the navigation bar, the page title is "Reports & Dashboards" with a "New Report..." button. On the left, a "Folders" sidebar lists "All Folders", "Region Reports", "My Personal Custom Reports", "My Personal Dashboards", "Put Reports to Share Here", and "System Only (Links)". The main content area, titled "All Folders", contains a search bar and a table of reports. The table has columns for Action, Name, Folder, and Created By. The "Bylaws Expiration Dates" link in the Name column is circled in red. Below it, a report titled "Accurate Ongoing Unit & Councils Bylaws Expiration Dates" is listed, with "Region Reports" in the Folder column and "Welch, Dania" in the Created By column.

Home My Region Organizations Forms Bylaws Reports

Reports & Dashboards

New Report...

Folders

Find a folder...

All Folders

- Region Reports
- My Personal Custom Reports
- My Personal Dashboards
- Put Reports to Share Here
- System Only (Links)

All Folders

Find reports and dashboards...

Recently Viewed All Types

Action	Name	Folder	Created By
	Bylaws Expiration Dates		
	Accurate Ongoing Unit & Councils Bylaws Expiration Dates	Region Reports	Welch, Dania

Process continued

Click on the Export Details button, then click on Export to download an excel spreadsheet of your Region's units and their bylaws expiration dates.

Bylaws Expiration Dates

Report Generation Status: Complete

Report Options:

Summarize information by:

--None--

Show

All organizations

Time Frame

Date Field

Last Activity

Range

Custom

From

To

Run Report

Hide Details

Customize

Save As

Printable View

Export Details

Export Report

Export File Encoding

Unicode (UTF-8)

Export File Format

Excel Format .xls

Export

Done

Process continued

The Region Bylaws Chairs are the only people who receive the copies of the signed cover pages, so you must keep these in a file or folder in case they are needed in the future for verification. The copies can be kept as hard copies, on a Google Drive, on a flash drive, etc.- this is your individual choice.

You can access the State Bylaws queue to see if the bylaws have cleared State approval.

If a unit has entered more than one proposed bylaws, click on the Approve/Reject button, then in the comments box write in “Duplicate entry by unit”, then click on Reject.

Process continued

- The NYS PTA Bylaws Coordinator will approve the bylaws by entering the date of approval, the date of expiration and electronic signature.
- The Bylaws Coordinator will edit the expiration date on the unit/council page in Givebacks as well as check that the membership dues amounts are correct in the unit store. If they need updating it will be done by the Bylaws Coordinator.
- The approved bylaws will then be sent to the email of the person who created the document where they can be printed out for distribution. *(you can access a copy of the approved bylaws on the unit's home page in Salesforce)*

Process continued

- The coordinator will conduct periodic reviews of the Region queue to remove any bylaws records that have been in the queue for more than 6 months.
- The Region Chair should also review their queue for bylaws that have been there for longer than 6 months. Contact the unit about any outstanding issues that may be holding up the process.

Unit/Council Name Change Process

1. A vote must be taken at a general membership meeting to approve the name change. This must be done even if the name change is due to a change in the name of the school with which the unit is affiliated.
2. The unit/council must send a copy of the minutes of the general membership meeting that show the unit/council voted to approve the name change to the Region Director and the Region Bylaws Chair, who will forward it to the NYS PTA Bylaws Coordinator.
3. The State office will have the name changed in all the system databases.

Unit/Council Name Change Process

4. After the name is changed in the systems:
 - a. **If the Bylaws are not expired and not expiring in the next 3 months**, the bylaws will be amended with the new name and reissued to the unit. If the officers have changed since the original adoption date, the NYS PTA Bylaws Coordinator will process with the current officers' names. The revised cover sheet will have to be signed and returned to the NYS PTA Bylaws Coordinator.
 - b. **If the Bylaws are expired or expiring in the next 3 months**, the unit or council **MUST** go through the Bylaws Wizard to renew their bylaws with the new name. They must follow the usual process for notification of and approval by membership and return the signed cover sheet to the Region Bylaws Chair and the NTS PTA Bylaws Coordinator.

Unit/Council Name Change Process

5. Mail to NYS PTA office (One Wembley Court, Albany, NY 12205):

The *original* NYS Sales Tax Exemption certificate- not a photocopy

OR

If unable to locate the original certificate

A letter on unit letterhead from the President of the unit, providing their name, title, phone number and email address, stating that the NYS Sales Tax Exemption certificate has been lost and that the unit's name has been changed (include the old name and the new name). The letter can be sent via email to pta.office@nyspta.org and to the NYS PTA Bylaws Coordinator at bylaws@nyspta.org.

6. Once all of the above is complete, the NYS PTA office will process the name change with the IRS and the NYS Sales Tax Exemption Department

(This procedure is also in the Google Drive under Region Resources)

Region Bylaws Process

- Bylaws for each Region must also be reviewed and renewed every three years
- You should assist your Region by being a part (if not the chair) of the Region Bylaws Committee
- Your Region Board should be made aware of any changes and vote to approve the bylaws to be presented prior to the annual meeting.

(A copy of your current region bylaws, the fillable template and instructions are on the Region Board Givebacks site)

Region Bylaws continued

- Your Region membership must be informed that bylaws will be voted on no less than 30 days before your Spring Conference/Annual Meeting . Any changes that are to be made should be included in the notification to the membership with contact information for questions.
- Once the bylaws have been approved, send the *signed* cover sheet and a copy of the Bylaws document to the Bylaws Coordinator as soon as possible (**via email**).
- A copy of the updated bylaws with the new expiration date and signed cover sheet will be returned to the Region Director and Region Bylaws Chair and posted to Region Boards section of Givebacks and the Region Resources section of the Google Drive, once approved by the Bylaws Coordinator.

Region Bylaws Chair – New Charter Responsibilities

Bylaws Process

- If available, attend the charter meeting with your Region Director or Chartering member *(you will then be able to collect the signed and dated cover sheet right away)*
- The unit should have completed their bylaws online and had them approved at the Charter Meeting. *(if not in attendance at the meeting, have the cover sheet collected and given to you as soon as possible after)*
- Once adopted, you can review and approve them.
- As soon as the FEIN #, and the NYS Tax exempt number have been obtained, they will be entered on to the unit's bylaws in Salesforce.

Thank you!

Any Questions??

Contact Geri Lehane at bylaws@nyspta.org