



BYLAWS TRAINING FOR REGION BYLAWS CHAIRS (RBC) AND REGION DIRECTORS (RD)

Geri Lehane

NYS PTA Bylaws Coordinator, Past Region Bylaws Chair, Northeastern Region



Notes for RBC's about the Bylaws Process

- 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 registered 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

- **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.**
- **No other articles or sections may be added to the bylaws by the units/councils.**
- **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.**
- **The proposed bylaws must be entered into the Bylaws Wizard. No paper copies of previous bylaws that have been updated will be accepted.**



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, you can send a *form letter* by email, or your own email, to the unit or council that their bylaws are due to expire **no less than 90 days prior to expiration.**
- This letter or your email should include your contact information (including the region generic bylaws mailing address) and instructions on how they can renew their bylaws.
(the 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 that can be used 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.

(This decision on dissolution would be considered by the RD, FSC and others in NYS PTA)



Process continued

Once a unit or council creates bylaws using the wizard, they will 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 | View | | | |



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.mysite.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

Bylaws-6256
12-703 Shenendehowa Council
12-000 Northeastern

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**

Recent Bylaws

| 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 an example of 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.

New Bylaws

| Action | Bylaws # | Unit or Council | Submitted Date | Type | Cover Page Received | Issues to Resolve |
|--------|-----------------------------|--|----------------|------------|---------------------|---|
| Edit | Bylaws-6390 | 12-070 Galway PTA | 5/2/2024 | New Bylaws | | No changes made from previous bylaws. |
| Edit | Bylaws-6408 | 12-374 Johnstown Junior Senior High School PTA | 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 \$81 |
| Edit | Bylaws-6414 | 12-038 Delaware Community School PTA | 5/15/2024 | New Bylaws | | |
| Edit | Bylaws-6453 | 12-310 Scotia-Glenville High School PTA | 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

| | |
|----------------------------------|---|
| Organization Name | 12-373 Fonda Fultonville Central School PTSA [View Hierarchy] |
| Type | Unit |
| Unit Code | 12-373 |
| Online Registration Link | https://mystpta.force.com/NewMemberRegistration?unit=12-373 |
| Total Number of School Employees | 0 |

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

| | |
|----------------------------------|--|
| Unit or Council | 12-373 Fonda Fultonville Central School PTSA |
| Type | New Bylaws |
| Approval Status | Approved by State |
| Approver | Kim DiTonne |
| Cover Page Received | 12/23/2020 |
| Issues to Resolve | |
| Generate Updated Bylaws Document | <input checked="" type="checkbox"/> |
| Incoming New | <input checked="" type="checkbox"/> |
| Merge incoming new | phrase needed to add to bylaws goes here |

Record Type: Unit Bylaws
Submitted Date: 6/3/2020
Approval Date: 1/11/2021
Expiration Date: 1/1/2024

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

| | | | |
|--|--|----------------------|--------------------------------|
| Unit or Council | 12-373 Fonda Fultonville Central School PTSA | Edit | Amendment Form |
| Type | New Bylaws | Record Type | Unit Bylaws |
| Approval Status | Submitted | Submitted Date | 5/7/2024 |
| Approver | Northeastern Bylaws Chair | Approval Date | |
| Cover Page Approved | <input checked="" type="checkbox"/> | Expiration Date | <input type="checkbox"/> |
| Issues to Review | <input checked="" type="checkbox"/> | | |
| Generate Updated Bylaws Document | <input checked="" type="checkbox"/> | | |
| Incoming New | <input checked="" type="checkbox"/> | | |
| Merge Incoming new | <input checked="" type="checkbox"/> | | |
| phrase needed to add to bylaws goes here | | | |

Bylaws Wizard Responses

| | |
|----------------------------|---|
| Organization Info Correct? | <input checked="" type="checkbox"/> Yes |
| Incorrect Info | <input type="checkbox"/> No |
| Membership Adoption Date | 4/17/2024 |
| President | Jessica Gossen |
| 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](#)

[« Back to List: Bylaws](#)

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

Bylaws Detail

| | | | |
|----------------------------------|--|----------------------|--------------------------------|
| Unit or Council | 12-373 Fonda Fultonville Central School PTSA | Edit | Amendment Form |
| Type | New Bylaws | Record Type | Unit Bylaws |
| Approval Status | Submitted | Submitted Date | 5/7/2024 |
| Approver | Northeastern Bylaws Chair | Approval Date | |
| Cover Page Approved | <input checked="" type="checkbox"/> | Expiration Date | <input type="checkbox"/> |
| Issues to Review | <input checked="" type="checkbox"/> | | |
| Generate Updated Bylaws Document | <input checked="" type="checkbox"/> | | |
| Incoming New | <input checked="" type="checkbox"/> | | |
| Merge Incoming new | <input checked="" type="checkbox"/> | | |



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 Cancel

Information

| | | | |
|----------------------------------|--|----------------|-------------|
| Unit or Council | 12-373 Fonda Fultonville Central School PTSAs | 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" value="5/29/2024"/> | | |
| Issues to Resolve | Verified w/secretary- removed Immediate Past President from the Executive Committee. | | |
| Generate Updated Bylaws Document | <input type="checkbox"/> | | |
| Incoming New | <input type="button" 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="button" value="President"/> |
| Vice President Structure | <input type="button" value="One VP Only"/> |
| Number of Vice Presidents | <input type="text" value="1"/> |
| Secretary Structure | <input type="button" value="One Secretary"/> |

Officer Term

| | |
|--------------|---|
| Officer Term | <input type="button" value="Two Consecutive One-Year Terms"/> |
|--------------|---|

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="button" value="No"/> |
| Election Month | <input type="button" value="April"/> |
| Annual Meeting Month | <input type="button" value="April"/> |
| Additional Nominations? | <input type="button" value="No"/> |
| Nom Cmte Report Publication | <input type="button" 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 | Chosen |
|-------------------------------|---|--------|
| | Immediate Past President Principal or Other Administrator Teacher Liaisons Parliamentarian (a non-voting member) Student Rep Historian | |

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 (shared office- one vote), 2 VP's, a recording and corresponding Secretary and a treasurer, they would have 6 officers and a quorum of 12 members.

Quorum

Quorum



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 | 0 | | |
| ▼ 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 |



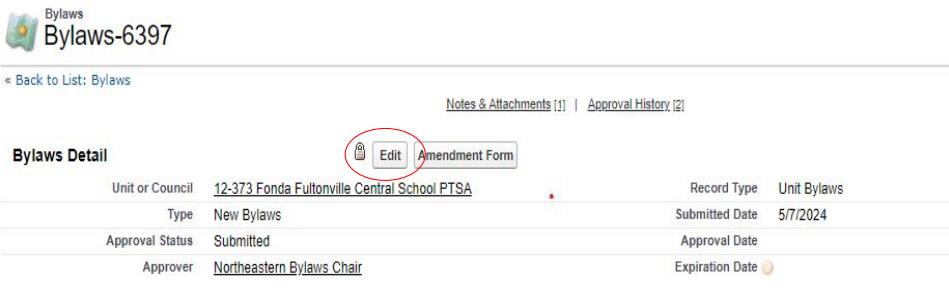
On the Council page, go to Bylaws then to the most recent approved bylaws. Scroll down until you see the section for Delegates. This is the number of delegates in addition to the unit president that each unit will enter in their bylaws. Each unit's number of delegates must match the number in the Council 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

« Back to List: Bylaws

Notes & Attachments [1] | Approval History [2]

Bylaws Detail

| Bylaws Detail | | Actions | |
|-----------------|--|-----------------|-------------|
| 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 | |

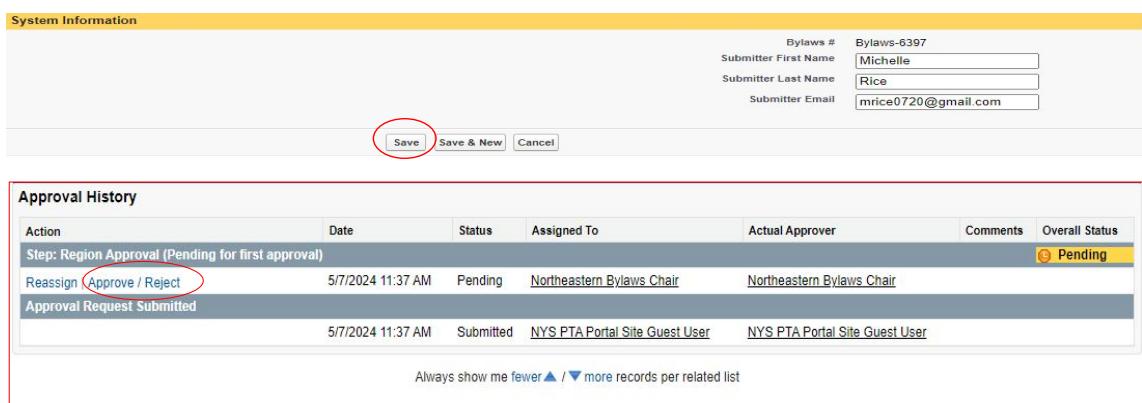
Actions:

- [Edit](#) (highlighted with a red circle)
- [Amendment Form](#)



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 | Michelle |
| Submitter Last Name | Rice |
| Submitter Email | 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 | | Pending |
| 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: 40px; width: 100%;"></div> |
| <input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Cancel"/> | |



Process continued

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

| Approval History | | | | | | |
|---|-------------------|-----------|--|--|----------|--|
| Action | Date | Status | Assigned To | Actual Approver | Comments | Overall Status |
| Step: State Approval (Pending for first approval) | 5/29/2024 7:58 PM | Pending | Pat Assortato | Pat Assortato | | Pending |
| Step: Region Approval | 5/29/2024 7:58 PM | Approved | Northeastern Bylaws Chair | Northeastern Bylaws Chair | | Approved |
| 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.

Home My Region Organizations Forms Bylaws Reports

Reports & Dashboards [New Report...](#)

Folders All 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 | Accrued Ongoing - Unit & Councils Bylaws Expiration Dates | Region Reports | Welch, Dania |

Bylaws Expiration Dates

Report Generation Status: Complete

Report Options:

Summarize information by: Show: Time Frame:

Date Field: 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 also upload the signed cover page to the bylaws page.

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 SBC 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 and/or the State Bylaws Coordinator 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. A photocopy of the NYS Sales Tax Exemption certificate (ST 119) must be emailed to the RD and the RD will send this by email to both the SBC and to Theda Smith in the State office.

OR If unable to locate the original certificate

A letter on unit letterhead- with the NEW UNIT'S NAME- 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 must be sent via email to tsmith@nyspta.org, to the NYS PTA Bylaws Coordinator at bylaws@nyspta.org and to the RD. There is a template letter that can be sent out to the unit to fill in and email back. This letter is in the Google Drive that the RD's can access.

6. Once all of the above actions are 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 that the RD can access)



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 Spring Conference/annual meeting.
- A copy of your current region bylaws, the fillable template and instructions are on the Region Board Givebacks site. The SBC can also send the expiring bylaws and template to the Region.



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**). Send the document as a Word document.
- 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 the meeting*)
- 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



**Scan the QR Code to take the
SLC Workshop Evaluation**