UNIT BYLAWS WIZARD INSTRUCTIONS

Step by Step explanation of each screen in the Bylaws Wizard process

Enter your NYS PTA Unit Code

Enter your name and email address (used to email document once complete)

Confirm the Unit Information: If the unit information is not correct according to your records, please select "no" and make a note of changes needed on the next screen.

Officers and Adoption Date: Provide the President and Secretary information and enter the adoption date if the bylaws have already been presented to your membership for a vote and adopted, otherwise leave the adoption date blank *(the region chair will fill the date in for you after approval)*.

Dues Amount: Fill in the membership dues of your unit. The total amount is determined by a vote of the membership of your association. Each member's dues must be at least $5.00. The amount of such annual dues shall include the portion payable to NYS PTA ($1.75) and the portion payable to the National PTA ($3.25) A unit who wishes to include a provision for a reduced rate for additional family members *(there is no "family" membership in the bylaws),* teachers/staff or students, please enter the appropriate dues amounts. All fields require an amount to be entered even if the amount is the same for all.

President Structure: Select the type of president structure that your unit will use. A President is the recommended option, but Co-presidents or a President and President Elect (in this case, the 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. The president and president elect will each only serve one term in each office). **The required officers are president, secretary and a treasurer. No person can hold any two elected positions.**

Vice President Structure: Enter the number of Vice Presidents and their structure.

By Designated Order (1st, 2nd, etc.)
By Job Title (examples: VP of Legislation, VP of Membership, or any other title designated by your unit)
At Large (order and duties determined in accordance with unit Procedures) ***At Large VP's are only able to serve for one term as a Vice president*** (due to no defined order or job title within the PTA)*
One VP Only
No VP

Secretary Structure: Units can have either a single Secretary or a Recording and a Corresponding Secretary.
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**. If you have chosen a president structure of President and President Elect, they will each only serve one term in each office.

Nominating Committee Members: You must specify the number of nominating committee members from the Executive Board, from the association (general membership) and the total combined number (must be an odd number). The bylaws must ensure that the committee includes members who are not members of the Executive Board but must include at least one member from the Executive Board. **All members must be elected. The Chair shall be elected by the Nominating Committee.**

Choose whether to elect a Nominating Committee alternate.

Choose the month the Election Meeting will be held.

Choose the month the Annual Meeting will be held.

Additional Nominations: Check yes 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."

Check no if you do not wish to require prior notice to run from the floor. However, checking no does not mean that additional nominations cannot be made. It just means that no prior notice is required and anyone can run from the floor at your election meeting.

Nominating Committee Report: Choose whether the nominating committee report will be published either 2 weeks or 1 month prior to the Election meeting.

Executive Committee: Consists of the elected officers of your unit. You may choose to include the Immediate Past President (if available). **Executive Board:** Consists of the executive committee and chairs of standing committees of your unit. You may choose to include other additional members:

The Immediate Past President (if available) - if not on Executive Committee
The Principal or other Administrator
Teacher Liaison
Parliamentarian (a non-voting member)
Student Rep
Historian
Directors/Building Representatives – (For SEPTAs, SEPTSAs, Central PTAs and Central PTSAs Only)

Council Delegates: If the PTA unit is a member of a council, input the number of delegates to the council (this number **must** be equal to the number specified in the council bylaws) and how they will be selected (choose one):

Nominated/elected at the same time as officers
Appointed by the President
Elected by Executive Board
Not Applicable (if your unit does not belong to a council)

Meetings/Quorum: A quorum is the number of members who must be present at a meeting before any business can be transacted. The quorum for an association meeting must be a number and not a percentage. For a unit of 100 members or more, 20 or 25 is a reasonable number. For a unit with less than 100 members, 15 is sufficient. The quorum **must** be at least two times greater than the number of officers **and no less than 10.**

Please Review: You may use the "Previous" button to go back to any screen to make corrections until everything is correct. When finished reviewing, click "Finish"

Your bylaws document is being generated and submitted electronically for approval: Please print this screen of instructions to walk you through completing the approval process

IMPORTANT: Only those provisions editable through the Bylaws Wizard may be changed by the constituent association. No other information may be added to the bylaws.

IMPORTANT: If you are planning on publishing the proposed bylaws document prior to your membership vote, please review your entries carefully before hitting the "Finish" button. Review the generated bylaws document as soon as you receive it and BEFORE publishing to make sure that all is correct. If you find any errors after hitting "Finish", contact your Region Bylaws Chair. They can correct any errors and issue a new document for you. *DO NOT GO BACK INTO THE WIZARD AND CREATE A NEW SUBMISSION.*

IMPORTANT: Your signed bylaws cover page must be sent to the Region Bylaws Chair as soon as possible after adoption, before the approval process can be completed.