

INSTRUCTIONS FOR COMPLETING THE STANDARD BYLAWS

2327 L Street, Sacramento, CA 95816-5014 ✉ (916) 440-1985 ✉ FAX (916) 440-1986 ✉ Email info@capta.org • www.capta.org

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1. **Do not alter, change, or add to any articles or sections with stars except for completing blank lines.** Authority for the articles and sections marked with stars are from the California State PTA bylaws (***) or are required by the Corporation Code of the State of California (**) and shall be included in all unit bylaws.
2. Several sections refer to information in the *California State PTA Toolkit* and may not be altered. These are policies or procedures of California State PTA.
3. Words in *italics* indicate optional provisions and should be lined out when not applicable.
4. Fill in or line out all blanks, as applicable.
 - a. To line out, neatly draw a single, straight, horizontal line through each word and/or sentence which does not apply. Do not use a slash, an X, or a strike. Do not use correction tape or fluid, and do not use marker.
5. Words in brackets [] are for information or directions only. They have been pre-lined out, e.g.: ~~[month]~~, but the directions provided must be followed.
6. Use the association's full legal PTA or PTSA name on the cover: *Selena Sloan Butler PTA* not *Butler PTA*; or *Phoebe Apperson Hearst High School PTSA*, not *Hearst High PTSA*. The association name is located on the charter. Contact council or district for assistance, if needed.
7. Spell out all words; do not use abbreviations, e.g.: Sept – September; 2nd - second; VP - vice president. Use the long form for dates – February 7, 2024.
8. Write numbers as words with place figures in parentheses, e.g.: one (1); twenty (20), five dollars (\$5.00); twenty-five cents (\$0.25). Do not duplicate words already included in the printed text.
9. Consider using inclusive language such as “chair” instead of gender specific “chairman.”
10. The following articles and sections require special attention:

Article I Name	Use a unit's full legal name as it appears on the bylaws cover page, e.g. Selena Sloan Butler PTA not Butler PTA. If out-of-council, line out “ <i>of the</i> ” and insert “out of” in the blank. <ul style="list-style-type: none"> To update your PTA's name, address, grades, a Change of Status form must be submitted; contact your council or district for more information. See <i>Changes in Association Status</i> in the <i>Toolkit</i>.
Article IV, Section 4 Membership & Dues	Line out unused blanks. Line out “dollars and” when only cents are used. Special memberships such as faculty, student and/or family memberships or membership/donations are added here. If using eBylaws, this is manually added to the PDF with a PDF editor.
Article V, Section 2 Officers	Minimum required officers are president, secretary and treasurer as required by California Corporations for Code Nonprofits. Parliamentarian and Historian are also included by California State PTA. For non-standard proposed changes, please contact the council, district, or California State PTA parliamentarian.
Article V, Section 4c Nominating Committee	With a nominating committee of three elected members, a majority would be 2 members. Two members would be charting the course for the PTA for the coming PTA term. Consider a larger group (5-7 members) for a more representative committee.
Article V, Section 7 Election Month	Must agree with Article VII, Section 2 and Standing Rule #6. The election must be held by the second week of April in order to allow the president-elect to attend the California State PTA Convention held in late April/early May (Article V, Section 9) and meet the council/district deadline for directory data (Standing Rules).

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	The month selected must agree with a month listed in Standing Rule 6 (list of Association Meeting Dates) and Article VII, Section 2.
Article VI, Section 4 Authorized Signers	President, treasurer and at least one other elected officer should be named as an authorized signer on bank account(s). The additional authorized signer(s) may not be related by blood, marriage, or reside in same household as president, treasurer, financial secretary, or financial reviewer; the secretary or financial reviewer may not serve as authorized signers.
Article VII, Section 4a Special Association Meetings	It is recommended that the number of people required to call a special meeting is greater than 2 or 3.
Article VII, Section 5b Association Meeting Quorum	<p>The voting power of the association is equal to all members as stated in Article VII, Section 6. The quorum must ensure general member participation beyond that of the executive board.</p> <p>The minimum quorum for an association meeting is the number of officers plus four (4), or eleven (11), whichever is greater. Officers are listed in Article V, Section 2.</p> <p>When there are ten (10) or more standing committee chairs and/or appointed, voting directors or specialists that number is divided by two (2) and added to the association quorum.</p>
Article VIII, Section 1 Executive Board	Standing committees function all year, e.g. Hospitality, Membership, Programs, Fundraising. These are listed in Standing Rule 17 and their chairs are members of the executive board.
Article VIII, Section 2g Financial Reviewer	If the Financial Reviewer is not elected, ratify the appointment of the Financial Reviewer at the first association meeting of the year.
Article VIII, Section 5 Special Executive Board Meetings	It is recommended that the minimum number of people required to call a special meeting is greater than 2 or 3.
Article VIII, Section 6b Executive Board Quorum	<p>The minimum quorum for an executive board meeting is based on the number of executive board members, including the principal and teacher representative (majority = more than half) or five (5) whichever is greater.</p> <p>When there are ten (10) or more standing committee chairs and/or appointed, voting directors or specialists that number is divided by two (2) and added to the executive board quorum.</p>
Article IX Council Membership	<p>Follow channels for assistance.</p> <p>If in council, consult with council parliamentarian to verify agreement with council bylaws.</p> <p>If out of council, this section will be lined out and subsequent Articles will be renumbered.</p>
Article XII Incorporated Associations	Attach copy of articles of incorporation, if an incorporated association. If unincorporated, this does not apply
Article XIII Identification Numbers and Fiscal Year	Associations are required by law to have a federal Employer Identification Number (EIN), a state Franchise Tax Board (FTB) number, a Registry of Charitable Trust (CT) number, and are required to file annual forms with the appropriate agency. Insert the corporation number if the association is incorporated. Follows channels for assistance and contact your council or district PTA for assistance.
Article XIV Parliamentary Authority	Incorporated Units – Add the unit's legal name in the blank line.
Standing Rules	
Additional Standing Rules may not conflict with, supersede or restate bylaws and they should not	

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restate <i>Toolkit</i> sections. Attach additional Standing Rules.	
Standing Rule #5 Vice Presidents	Use this section for an executive vice president, or a vice president if there is no executive vice president and only one vice president. If there are no vice presidents, line this section out.
Standing Rule #6 Association Meeting Dates	Set the first meeting of the fiscal year early enough in the school year to ensure that the PTA program and budget are approved by the association <i>prior to beginning PTA programs or spending PTA funds.</i> (Article VII, Section 3) One of the association meeting months must match the election month stated in Article V, Section 7 and Article VII, Section 2. [4 association meetings minimum recommended annually]
Standing Rule #10 Executive Board Meeting Date	There must be 14 days between an executive board meeting and the general association meeting that addresses the business conducted by the executive board
Standing Rule #12 Authorization for Expenditures	Guidelines for the expenditure of unbudgeted funds is as follows (<i>California State PTA Toolkit</i> , Finance section, Unbudgeted Expenditures): <ul style="list-style-type: none"> • Eight (8) or more association meetings per year – up to \$500.00 • Five (5) to seven (7) association meetings per year – up to \$750.00 • Four (4) or fewer association meetings per year – up to \$1000.00
Standing Rule #17 Standing Committees	Standing committees are those committees that meet all yearlong, e.g. Membership, Health and Safety, Hospitality.