



## LOCAL UNIT INSTRUCTIONS FOR THE BYLAWS FIVE (5) YEAR REVISION PROCESS

Welcome to the bylaws revision process! Your bylaws are the rules that govern your PTA/PTSA. They are there to help and guide you and your future members. There are two sections, the first section has basic information to help streamline your process and the second section takes you through the **July 2016** local unit bylaws template step by step, Article by Article, using the directions and tips. You can take the second section and put it, side by side, with the bylaws template so that you may follow it as you go.

A copy of all instructions, responsibilities, checklist, and frequently asked questions can be found on the [vapta.org](http://vapta.org) website.

If you have any questions or need assistance, please contact the Virginia PTA Bylaws Committee at: [bylaws@vapta.org](mailto:bylaws@vapta.org).

### SECTION ONE: BASIC INFORMATION

**Follow these three (3) instructions to help insure the success and approval of your bylaws revisions:**

**1. DO NOT CHANGE ANY OF THE LANGUAGE THAT HAS BEEN POUNDED (#).**

2. Work only from the **current** template of the Local Unit Bylaws, which can be found on the website at: [vapta.org](http://vapta.org). The template date is in the lower left hand corner. Please do not change or replace this date since we use this date to ensure that the correct template is being used.

3. **DO NOT RETYPE/REFORMAT the template.** Read through the Local Unit Bylaws template and become familiar with the required Articles and Sections, which are designated with the **pound symbol (#)**. If local unit bylaws are rejected, it is often because inserted language conflicts with the required (#) language and/or other language in the bylaws.

### **GETTING STARTED!**

**1. Before you begin, you will need to do the following:**

**Set your calendar:** Allow ample time for your committee to meet, discuss all recommendations, review language to be sure it is clear of intent and review all sections of the bylaws to be sure that no area conflicts with another. **The Virginia PTA Bylaws committee recommends a minimum of 90 days to complete the entire process from committee action to General**

**Membership approval.** Bylaws should meet the needs of the local unit and reflect how your unit conducts business. If questions arise, please contact your District Director or the Virginia PTA State Bylaws Chair for clarification.

- ❖ **Your President:** Ensure that your President has a copy of the following: “Local Unit President Responsibilities For The Bylaws Five (5) Year Revision Process” instructions, "Local Unit Bylaws Chair Responsibilities For The Bylaws Five (5) Year Revision Process” instructions, “Local Unit Instructions For The Bylaws Five (5) Year Revision Process” instructions, "Local Unit Bylaws Checklist”, and the “Bylaws Frequently Asked Questions”.
- ❖ **Committee:** Form a committee of at least three (3) members to work on the bylaws.
- ❖ **Your Current Bylaws:** Obtain a copy of your current unit bylaws. If you cannot locate a copy, please contact Virginia PTA state office and request a copy of the bylaws they have on file for your unit.
- ❖ **Your Amendments:** If you have had any approved amendments since your last revision this is the time to insert them.
- ❖ **Local Unit Bylaws Template:** Obtain a copy of the current "Local Unit Bylaws," template, which can be found on the Virginia PTA Website. There are two templates, Local Unit Bylaws President and Local Unit Bylaws President-Elect.
- ❖ **Local Unit Bylaws Template, President:** Use this template if you do not have a president-elect position or wish to remove the president-elect position from your bylaws.
- ❖ **Local Unit Bylaws Template, President-Elect:** Use this template if have a president-elect position in your last bylaws or if you wish to add a president-elect position to your bylaws.
- ❖ **Items for Your Committee:** A copy of your current Local Unit Bylaws, any past approved amendments, "Local Unit Instructions For The Bylaws Five (5) Year Revision Process” instruction, "Local Unit Bylaws Checklist”, and the “Bylaws Frequently Asked Questions”. Please make copies of each for all members of your committee.

## 2. Meet with your committee:

- ❖ Prior to the first committee meeting, provide a copy of all the items listed above in the “Items for Your Committee” section.
- ❖ Review and compare the current bylaws to the current template. **Explain that all Articles, sections and sub-sections, preceded by the pound symbol (#) must be included in its entirety, exactly as worded.** It is recommended to use the new suggested language found in the current bylaws template in lieu of the old language found in your current bylaws.
- ❖ Present the proposed bylaws to the Executive Board for their input. All board members recommendations should be considered.

### **3. Take it to your membership for approval:**

Once you have your proposed bylaws revised, they are ready for the next step; approval by your general membership. Please make sure your proposed bylaws are available for your general membership to review. Remember you **MUST** give the general membership **at least thirty (30) days** to review your proposed bylaws, rational, and/or amendments before they can be approved at a general membership meeting. Please do not forget to post the date of when the general membership meeting will be held.

### **4. After your proposed bylaws are approved by your membership:**

- ❖ Upon approval, the cover sheet must be completed with the required original signatures of the President, Secretary, and the Bylaws Chair. Complete all required information on the cover sheet; please remember that this form must have **three (3)** different names and signatures.
- ❖ Make sure that you provide a signed copy to the president and secretary for their files.
- ❖ After you have the general memberships' approval, please send the original with original cover sheet plus one (1) complete copy to the Virginia PTA state office, no later than two (2) weeks after General Membership adoption. Please mail to the following address:

**Virginia PTA  
1027 Wilmer Avenue  
Richmond, VA 23227-2419**

- ❖ The president will receive notice from the Virginia PTA state office indicating that they are in receipt of the proposed bylaws.
- ❖ The Virginia PTA State Bylaws committee will review the proposed bylaws. You should have them returned to you within six (6) to eight (8) weeks. If not, contact the bylaws committee chair at, [bylaws@vapta.org](mailto:bylaws@vapta.org).
- ❖ Upon approval the Virginia PTA state seal will be affixed to the bylaws. The approved bylaws will be sent to the Local Unit President and a copy will remain in the Virginia PTA state office.
- ❖ Your PTA secretary shall keep this official copy in your local unit permanent records.
- ❖ Please remember to destroy all copies of the proposed bylaws that are in your file and replace them with the copies of the bylaws that were approved by the Virginia PTA Bylaws Committee.
- ❖ Please make sure that all of your board members receive a copy of the approved bylaws.

### **SECTION 2: STEP BY STEP, ARTICLE BY ARTICLE!**

**COVER SHEET:** PLEASE PRINT OR TYPE THIS INFORMATION CLEARLY. Insert the complete name of your local unit, insert the city/county for the location of your school, and insert

the date the proposed bylaws were approved by the general membership. Fill in name and signature of the President, Secretary and Bylaws chair. Remember there must be **three (3)** different signatures on this form. (Note: If the Secretary is the bylaws chair, Secretary will sign as Secretary and bylaws Vice-Chair will sign as Chair.) It is important to give both daytime and evening numbers, and email address for the local unit president. If there is a question during the review, the Virginia PTA state bylaws committee member must contact the president (the official spokesman for the association) for clarification. If we cannot contact the president, the proposed bylaws will be rejected. **Please do not print/type in the State Bylaws Committee area.**

### **TABLE OF CONTENTS:**

Insert full legal name of your local unit. Once you receive the approved bylaws, please make sure that the Article number, Title and page numbers are listed correctly on the table of contents.

### **TITLE:**

Insert the full legal name of your unit on the first line (without the PTA/PTSA). On the second line either include "STUDENT" if you are a PTSA or remove it if you are a PTA.

### **#Article1: Name and Area:**

Insert the full legal name of your unit followed by either Parent Teacher Association (for PTA) or Parent Teacher Student Association (for PTSA). Insert the name of the city or county in which your unit resides and after "local," you insert either PTA or PTSA. No other changes can be made.

### **#Article 2: Purposes:**

**Section 1:** Insert the name of your unit, choose either PTSA or PTA. You will use the PTA, PTSA or PTA/PTSA abbreviation for the rest of this document in lieu of Parent Teacher (Student) Association. No other changes can be made.

### **#Article 3: Principles:**

Insert the name of your unit, choose either PTA or PTSA. No other changes can be made.

### **#Article 4: Relationship with National PTA, Virginia PTA and Constituent Associations:**

Skip this section, no changes can be made.

### **# Article 5: Membership and Dues:**

Skip this section, no changes can be made.

### **Article 6: Officers and Their Elections:**

**Co-presidents and/or Co-officers are prohibited by Virginia PTA. Only one person can occupy each separate elected office. You cannot circumvent our bylaws by placing co-presidents / co-officers in your standing rules. Also the office of president-elect cannot be used to circumvent the rules against having co-presidents.**

**President Only: Use the President Template.** If you do not have, will be removing or not considering the office of president-elect.

**President and President-Elect: Use the President-Elect Template.** If you have or are considering the office of president-elect, please note: The individual elected as president-elect is making a commitment to serve two (2) terms, one as president-elect and one as president at the end of the current president's term.

**Section 1.b (1.c for President-Elect template):** Insert number of vice presidents. If more than one (1) vice president, remember to include duties for each one under Article 7.

**Corresponding Secretary:** Local units who use the office of corresponding secretary would insert that office in the section immediately following secretary as item 1d (item 1e for President-Elect template) and treasurer would then be renumbered as #1.e (#1.f for President-Elect template). Remember to add the duties for the corresponding secretary in Article 7.

**Parliamentarian:** The office of parliamentarian is NEVER an elected office and should not appear in this article.

**Specific individual elected:** A local unit cannot require that a certain individual be elected to an office.

**#Section 3b. Nominating Committee:** Insert the number of members on the nominating committee, being sure that it is an odd number (3, 5, etc.) with **no less than three members**. The association cannot require certain individuals (e.g. principal or vice president) be elected to this committee. The language in current Local Unit Bylaws for this area requires that **all** the members of the nominating committee must be elected by the general membership. A smaller portion of the members **cannot** be elected by the executive board. The President **cannot** serve on the nominating committee in any capacity. No other changes can be made.

**#Section 4.a:** Insert the month of the general membership election meeting. This must match the same month as inserted in Article 11, Section 2. If the month for your election varies, it's permissible to list both months, e.g. "**May or June,**" but not "**May-June.**" No other changes can be made.

**#Section 4. c:** Insert the month that the new officers assume their official duties (which is the same time that the old officers duties end), making sure that it does not precede the month of the election noted in #Section 4.a. This is usually the month of the last general membership meeting of the year. It is permissible, however, to have the same month as listed in section 4.a. No other changes can be made.

**#Section 5:** Insert the number for the term of office, shall be either one (1) or two (2) years. Insert the maximum number of consecutive terms a person can serve in the same office, shall be either two (2) or three (3) terms. Remember the maximum years anyone can serve in the same office **cannot** exceed four (4) years. So one (1) or two (2) years term can be combined with two (2) consecutive terms but only the one (1) year term can be combined with three (3) consecutive

terms. This section has new changes/language. **(President Elect template: Remember the President can serve for only one (1) consecutive term as President and cannot serve as President Elect following their term as President. The President Elect can serve for only one (1) consecutive term as President Elect and automatically become President the following term).** No other changes can be made.

**#Section 6:** Skip this, no changes can be made.

**PROVISO:** (President-Elect template only) Insert the month and year for the first election adding President-Elect to your bylaws and election, insert the month and year for the following election for the last 2 grey areas. For example first election month and year May 2016, President-elect will assume the office of President May 2017 (May 2018 for a two year term), and President will be removed from the election May 2017 (May 2018 for a two year term). Note: Use this section if you are adding a President Elect for the first time; please delete this section if your unit currently has a President-Elect.

### **Article 7: Duties of Officers**

Local units must define the duties of their elected officers here. Individuals should have knowledge of what duties are required of them before they agree to run for office.

**Section 2.b. (Section 3.b. in the President-Elect template):** You must list the job title of each vice president if your local unit has two (2) or more vice presidents. (ie 2.b.1 first vice president shall be membership chair, 2.b.2 second vice president shall be fundraising chair, 2.b.3 third vice president shall be ways and means chair etc. This is just an example for the job titles.).

**Corresponding Secretary:** Local units who use the office of corresponding secretary would insert that office duties in the section immediately following secretary as section 4 (section 5 for president-elect template) and treasurer would then be renumbered as #5 (#6 for President-Elect template). #Section 5 would be renumbered as #Section 6 (#Section 6 would become #Section 7 for President Elect template). Remember to add the office for the corresponding secretary in Article 6.

**#Section 3, #Section 4 and # Section 5 (#Section 4, #Section 5 and #Section 6 President Elect template)** Skip, no changes can be made.

### **Article 8: EXECUTIVE COMMITTEE**

**Section 1:** Some units define the body of their executive committee as only the elected officers. You may wish to encourage your principal to be a part of your executive committee. This is the makeup of your executive committee, quorum, and who can vote at the executive committee meetings. **NOTE:** *Robert's Rules of Order, Newly Revised* explains that the executive committee (generally the elected officers) is the small body of the executive board.

**Section 2:** Review the duties of your executive committee to be sure that there are no conflicts with the duties of the president, the association, or the executive board.

**Section 3:** This covers chairmen and members appointment to your standing and special committees.

**Section 4:** Insert the number for the days' notice to be given. You may only need to give two (2) or three (3) days' notice.

**An executive committee is not required. If you chose not to have an executive committee, remove this article and renumber the following articles.** If your unit does not use the executive committee, you would remove this article and renumber the remaining articles accordingly. Article 8 would be Executive Board, and so forth.

### **Article 9: Executive Board**

**Section 1:** This section defines the makeup of your executive board. Standard language provides for the elected officers, the standing committee chairs, the principal and a faculty representative to be a part of the executive board. This is the makeup of your executive board, quorum, and who can vote at the executive board meetings.

**Appointed positions:** If your unit has appointed positions, they should be listed in Section 1, too, if you desire them to be members of your executive board and have a vote. For any appointed position you must include, in the appropriate place, who will have the responsibility for the appointment (president, executive committee, or executive board).

**Parliamentarian:** If your unit utilizes a parliamentarian, that position may be listed in Section 1 as well, but a parliamentarian has the duty to maintain a position of impartiality, and therefore, must forego his/her right to vote (*Robert's Rules of Order, Newly Revised*).

**#Section 2, #Section 4, #Section 5 and # Section 7:** Skip these sections, no changes can be made.

**Section 3:** Review the duties of your executive board to be sure that there are no conflicts with the duties of the president, the association, or the executive committee.

**Section 6:** Insert the number of meetings to be held during your fiscal year; this should be a reasonable number (at least four (4)), do not use one (1). Insert the number of days' notice needed for special executive board meetings; this should be a reasonable number (**at least three (3)**) so that the majority of your board members may attend.

### **Article 10: Committees**

This article addresses two (2) types of committees: **standing** and **special**. A standing committee is one that performs a continuing function and remains in existence; a special committee is one that is appointed as need arises to carry out a specified task, at the completion of that task the special committee ceases to exist.

**#Section 1, #Section 2 and #Section 8:** Skip these sections, no changes can be made.

**Section 3:** Insert the number of years for the term of each chairman. We recommend that the term of your appointed committee chairman be the same as your elected officers. (Can be less but not more).

### **Article 11: General Membership Meetings**

**Section 1:** Insert the number of meetings to be held during the school year, this should be a reasonable number (at least three (3)), do not use one (1). It is recommended that an **elementary PTA** hold at least **five (5)** meetings a year. A **secondary PTA/PTSA** is recommended to hold at least **three (3)** meetings a year. Insert the number of days' notice given for the meeting dates; this should be a reasonable number so that the majority of your general membership members may attend. At least **ten (10) days' notice** is recommended for regular meetings. There should be **more days'** notice for a regular meeting than a special meeting (**see section 3**). Most local units schedule their regular meetings dates for the year and share those dates with their membership.

**Section 2:** Insert the month of the general membership election meeting. This must match the same month as inserted in Article 6, Section 4. If the time of your election varies, it is permissible to list both months, e.g. "**May or June,**" but not "**May-June.**"

**Section 3:** Insert number of days' notice to be given for the special meeting dates. It is recommended that **five (5) days' notice** be given for special meetings. Special meetings are unscheduled, emergency meetings that must be held before the next scheduled regular meeting. There should be **less days'** notice for a special meeting than a regular meeting (**see section 2**).

**Section 5:** Insert number of members required for a quorum. We require that the quorum for a general membership meeting shall be ten (10) or more members.

### **Article 12: Council Membership**

If you are not a member of a council or a council does not exist in your county or city, delete this Article and renumber the following Articles. If you do not know if you are in a council or do not know the name of your council, call the Virginia PTA state office at (804) 264-1234 or email at: info@vapta.org.

**Section 1.a:** Insert the name of your council and insert the number of delegates or alternates. The number of delegates to the council does not include your president and principal. The number of your unit's delegates must reflect the requirements as stated in the bylaws of your council.

**Section 1.b:** Insert "elected" or "appointed". Insert the month that they are elected or appointed. Most delegates are appointed. Make sure that the month is either the same or after the month your new officers assume their official duties. See Article 6, Section 4.c.

**Section 1.c:** Insert the name of your council and insert number of years for the term of your delegates, which is usually the same as the standing committee chairs. See Article 10, Section 3.



**Section 2:** Insert the name of your council. Local units come under the bylaws of their council in defining membership and dues of the council portion. (Dues are required for Council membership)

**#Article 13: District Membership**

**Section 1:** Insert the name of your district (a district is a subdivision of the state as designated by Virginia PTA). If you do not know the name of your district, call the state office at (804) 264-1234 or email at: info@vapta.org to obtain that information.

**Section 2, Section 3, and Section 4:** Skip these sections, no changes can be made.

**#Article 14: Fiscal Year**

Fill in the first blank with the beginning date and the second blank with the ending date of your fiscal year. Virginia PTA and the IRS require that your fiscal year end on the last day of a calendar month. It should cover an entire year. Be sure the dates are numbers, not ordinals (July 1 not July 1st, June 30 not June 30th.)

**#Article 15: Parliamentary Authority**

Skip this section, no changes can be made.

**#Article 16: Local Unit Bylaws Revisions and Amendments**

Skip this section, no changes can be made.