



Local PTA/PTSA Bylaws Template

For all Pennsylvania PTA Local PTAs/PTSAs

The official bylaws of

<u>Julia Ward Howe Parent Teacher Association</u>	PTA ▾
<u>(PTA), Inc.</u>	

(Local PTA/PTSA Name)

(PTA or PTSA)

Table of Contents

Article I: Name..... 3

Article II: Purposes..... 3

Article III: Principles and Basic Policies.....3

Article IV: Relationship with National PTA and Pennsylvania PTA..... 4

Article V: Good Standing Status.....5

Article VI: Membership and Dues..... 5

Article VII. Financial Operations..... 5

Article VIII. Officers and their Duties..... 6

Article IX: Executive Board..... 7

Article X: Removal and Resignations of Executive Board Members..... 8

Article XI: Nominations and Elections..... 8

Article XII: Committees..... 9

Article XIII: General Membership Meetings..... 10

Article XIV: Council Membership..... 10

Article XV: Pennsylvania PTA Annual Meeting and Meetings of the Voting Body..... 10

Article XVI: National PTA Convention..... 11

Article XVII: Dissolution and Withdrawal of Charter..... 11

Article XVIII: Parliamentary Authority..... 11

Article XIX: Fiscal Year..... 11

Article I: Name

The name of this association is the

Julia Ward Howe Parent Teacher Association (PTA), Inc.	PTA ▾
---	--------------

(Local PTA/PTSA Name)

(PTA or PTSA)

It is a not-for-profit corporation organized under the laws of the Commonwealth of Pennsylvania and under the authority of the Pennsylvania Congress of Parents and Teachers, Inc. (Pennsylvania PTA), a branch of the National Congress of Parents and Teachers (National PTA). It may also be referred to as the "PTA" in these bylaws.

Article II: Purposes

Section 1. Objectives. The purpose or purposes (Objects) of this PTA, in common with those of the Pennsylvania PTA and National PTA, are:

- A. To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- B. To raise the standards of home life;
- C. To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- D. To promote the collaboration and engagement of families and educators in the education of children and youth;
- E. To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- F. To advocate for fiscal responsibility regarding public tax dollars in public education funding.

Section 2. Awareness. The purposes of the National PTA, the Pennsylvania PTA and this PTA are promoted through advocacy and education with parents, families, teachers, educators, students, and the public; developed through conferences, committees, projects, and programs; and governed and qualified by the basic principles set forth in Article III.

Section 3. Federal Status. The association is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code (referred to as "Internal Revenue Code").

Article III: Principles and Basic Policies

Section 1. Principles. The basic principles of this PTA, consistent with the basic principles of the Pennsylvania PTA and National PTA, are:

- A. This PTA shall be noncommercial, nonsectarian, and nonpartisan.
- B. This PTA shall work to engage and empower children, families and educators within schools and communities to provide quality education for all children and youth and shall seek to participate in the decision-making process by influencing school policy and advocating for children's issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities and local education authorities.
- C. This PTA shall work to promote the health and welfare of children and youth and shall seek to promote collaboration among families, schools, and the community at large.
- D. Commitment to inclusiveness and equity, knowledge of PTA and professional expertise shall be guiding principles for service in this PTA.

Section 2. Basic Policies. The following basic policies are the operational requirements and dissolution in common with those of National PTA and Pennsylvania PTA.

- A.** No part of the net earnings of the association shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private individuals except that the association shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.
- B.** Notwithstanding any other provision of these articles, the association shall not carry on any other activities not permitted to be carried on (i) by an association exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an association, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.
- C.** Upon the dissolution of this association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or associations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with National PTA.
- D.** The association or members in their official capacities shall not, directly, or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

Article IV: Relationship with National PTA and Pennsylvania PTA

Section 1. Pennsylvania PTA. Pennsylvania PTA (PAPTA) is a state constituent of the National PTA and shall abide by the National PTA bylaws and policies.

Section 2. Local PTAs. The PAPTA Board of Directors will establish procedures for organizing and chartering local PTAs/PTSAs in the Commonwealth of Pennsylvania.

Section 3. Governance.

- A.** The PAPTA Board of Directors will establish policies and procedures for the constituent associations within Pennsylvania. This includes setting "good standing" requirements, revoking charters, dissolving associations, and implementing other necessary policies.
- B.** Any amendment to the National PTA Bylaws that affects constituent associations will automatically amend the bylaws of the PAPTA and all its constituent associations, if applicable, without requiring any additional action. Notice of the amendment will be provided to all constituent associations.
- C.** Every constituent association organized under the authority of the PAPTA must adopt bylaws to govern its operations. These bylaws must not conflict with the rules of the PAPTA or Pennsylvania state nonprofit corporate law, and they will be subject to review by the PAPTA.
- D.** Bylaws of this Local PTA shall be updated every five (5) years on the most current template available from the Pennsylvania PTA.

Section 4. Record Retention. This PTA is required to maintain permanent books of account and records that sufficiently document their gross income, receipts and expenditures. This includes detailed records of membership numbers and the dues collected and sent to both the PAPTA and the National PTA. These books and records must be made available for inspection at any reasonable time by an authorized representative of the National PTA and/or the PAPTA.

Article V: Good Standing Status

To maintain good standing status, this PTA must:

- A.** Adhere to the purposes and basic policies of the PTA;
- B.** Have bylaws approved every five years by the PAPTAs;
- C.** Remit the state and national portions of the membership dues monthly to the PAPTAs;
- D.** Submit the name and contact information of the President to the PAPTAs immediately following each annual meeting;
- E.** Ensure that this PTA's information is accurately reported to the PAPTAs by June 15 of each year and is updated throughout the year as changes occur;
- F.** Provide a copy of the appropriate IRS Form 990, as required by tax regulations, upon completion, but no later than November 15 of each year;
- G.** Submit an approved, signed copy of all annual audit reports (either an internal financial review or a CPA completed) immediately following their approval by the general membership; and
- H.** Meet any other criteria as prescribed by the PAPTAs.

Article VI: Membership and Dues

Section 1. Nondiscrimination. Membership in the PTA is open to anyone who supports the mission, purposes, and principles of the National PTA and pays the required dues as outlined in these bylaws, without any discrimination.

Section 2. National PTA and Pennsylvania PTA. Every individual who is a member of this PTA is, by virtue of that fact, a member of the National PTA and of the Pennsylvania PTA.

Section 3. Dues. Each member of this PTA is required to pay annual dues, which include the local portion set by this PTA at their Annual Meeting, the state portion of **\$2.75** established by the PAPTAs and the national portion determined by the National PTA.

Section 4. Membership Year. This PTA must conduct an annual membership drive but individuals may be admitted to membership at any time. The membership year will run from July 1 to June 30 each year.

Section 5. Membership List and Dues Submission. The PAPTAs will keep an updated list of local constituent association leaders and members with accurate contact information, which will be shared with the National PTA. Membership dues shall be processed via PAPTAs' online membership platform. This shall be completed on a monthly basis beginning September 30th of each year.

Article VII. Financial Operations

Section 1. Banking.

- A.** All funds shall be kept in bank accounts in the name of this PTA.
- B.** All checks shall be signed by two (2) authorized signers.
- C.** Authorized signers on the bank accounts shall not be related by blood or marriage and shall not reside in the same household.
- D.** There shall be at least three (3) authorized signers listed at the bank.
- E.** The president and treasurer shall be signers, unless prohibited by employment.
- F.** A member shall be appointed by the executive board, who is not an authorized signer on the bank account(s) to open, review, initial/date each bank statement and forward it to the treasurer.

DRAFT

Section 2. Financial Audit(s)

- A.** An annual financial audit shall be performed by an auditor approved by the executive board or by an audit committee of at least three (3) members elected by the executive board.
- B.** The auditor or audit committee members shall not be authorized signers, the incoming treasurer, related by blood or marriage and shall not reside in the same household as the authorized signers.
- C.** A report of the findings of the audit shall be submitted in writing to the executive board to be presented to the general membership for adoption by majority vote at the next regular general membership meeting; the report shall be signed and dated by all auditing parties.
- D.** A financial audit shall also be performed if an authorized signer is added or deleted on any bank account and at any other time deemed necessary by the president or three (3) or more members, by an audit committee that shall be elected by the executive board within five (5) days.

Article VIII. Officers and their Duties

- A. Officers.** The officers of this PTA shall consist of a president; one or more vice president(s); a recording secretary; a corresponding secretary, a historian and a treasurer.
- B. Eligibility.** Each officer shall be a current member of this PTA and shall not serve in more than one elected position simultaneously. All officers of this PTA must be at least eighteen (18) years of age or over, as set forth in Pennsylvania State Statute.
- C. Term.** Officers shall assume their official duties on July 1st and shall serve for a term of one (1) year, or until their successor is elected. No officer may be eligible to serve more than three (3) consecutive one-year terms in the same office. A person serving over six months of a term shall be deemed to have served a full term in that office.
- D. Vacancies.** A vacancy in the office of president shall be filled for the remainder of the term by a vice president. A vacancy in any other office shall be filled by a vote of the executive board.
- E. Duties of Officers**
 - 1. President.** The president shall:
 - i.** Be the chief executive officer of this association;
 - ii.** Preside at and ensure a quorum is present at all general membership and executive board meetings of this PTA;
 - iii.** Serve as an ex-officio member of all committees except the Nominating Committee, Audit Committee and the Elections Committee;
 - iv.** Coordinate the work of the officers, executive board, and committees of this PTA;
 - v.** Ensure all updated officer and committee chairperson information is on file with the PAPTAs electronic membership system;
 - vi.** Communicate with PAPTAs to comply with all Good Standing Information;
 - vii.** Retain all official records of this PTA and have a current copy of this PTA's bylaws available for membership review;
 - viii.** Serve as the official representative of this PTA and be authorized to sign contracts; and
 - ix.** Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the executive board of the association.
 - 2. Vice President.** The vice president(s) shall:
 - i.** Serve as an aide to the president;
 - ii.** Perform the duties of the president in the event the president is absent or temporarily unable to execute the duties of the office; and
 - iii.** Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority or directed by the executive board or the association.

- 3. Secretary.** The secretary shall:
- i. Record and maintain the minutes of all meetings of the Executive Board and the General Membership;
 - ii. Maintain a current copy of the bylaws and membership list;
 - iii. Present a written copy of the minutes from the previous meeting for corrections, amendments, and approval;
 - iv. Be responsible for all correspondence of this PTA, as needed and as directed by the president; and
 - v. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the executive board or the association.
- 4. Treasurer.** The treasurer shall:
- i. Maintain a full and accurate account of the funds, receipts and disbursements of this PTA;
 - ii. Provide a written statement to the executive board at each meeting;
 - iii. Disburse funds as authorized by the approved budget;
 - iv. Remit and process monthly dues to Pennsylvania PTA;
 - v. Keep a full and accurate account of all income and expenditures including bank statements, deposit receipts, budgets, invoices, and paid receipts in accordance with the records retention policy as provided by the Pennsylvania PTA;
 - vi. Record national and state portions of the membership dues separate from record of general funds of this PTA;
 - vii. Present a written and verbal financial statement of each financial account which shall include the balance from the previous meeting, list of deposits and expenditures, and current balance, along with a combined balance of all accounts, at all executive board and general membership meetings;
 - viii. Present all audit reports to the general membership for adoption at the first general membership meeting held after their completion.
 - ix. If unit is incorporated, notify the Pennsylvania Department of State, Bureau of Incorporation, when there is a change of officers;
 - x. Submit via PAPTA's virtual membership platform annually:
 1. A copy of the appropriate Form 990 as per IRS regulations; and
 2. a signed copy of all audit reports to the state office immediately following adoption by the general membership.
 - xi. Compile and submit all financial documents necessary to complete an audit to the elected audit committee or approved auditor as directed by the executive board.
 - xii. Prepare, or cause to be prepared, an annual report for financial review or audit;
 - xiii. Prepare and file, or cause to be filed, the IRS Form 990 Return of Organization Exempt from Income Tax by November 15th; and
 - xiv. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the executive board or the association.

Article IX: Executive Board

Section 1. Purpose. The purpose of the executive board shall be to manage the business of this PTA between general membership meetings.

Section 2. Composition. The executive board of this PTA shall include all elected officers, the principal and all chairpersons of standing committees. All records, books, and other materials pertaining to the

position shall be turned over to the president and all funds pertaining to the position shall be returned to the treasurer within fourteen (14) days of the expiration of the term of office or when the individual ceases to hold the position.

Section 3. Meetings.

- A. Regular.** Regular meetings of the executive board shall be held at least quarterly during the fiscal year at times and dates determined by the executive board.
- B. Special.** Special meetings may be called by the president or when requested by a majority of the executive board members, upon three (3) days' written notice to each member.
- C. Quorum.** A majority of the members of the executive board shall constitute a quorum.

Section 4. The executive board shall:

- A.** Transact such business as referred by the membership of this PTA and act in emergencies between general membership meetings and have all emergency actions ratified at the next general membership meeting.
- B.** Provide a report at each meeting of the general membership.
- C.** Create standing and special committees and appoint the chairperson for all committees;
- D.** Approve plans of work of the committees;
- E.** Elect an auditor or an auditing committee to audit the treasurer's accounts;
- F.** Prepare an annual budget for the upcoming fiscal year, to be submitted to the members for adoption at the annual general meeting; and
- G.** Approve payment of routine bills within the limits of the approved budget.

Article X: Removal and Resignations of Executive Board Members

- A. Removal-** A member of the Executive Board (including officers) may be removed by an affirmative vote of a majority of the General Membership present and voting, when it finds that the best interests of this PTA shall be served. This action shall take place only at a meeting called for the purpose of removing the executive board member and the meeting notice, sent at least ten (10) days in advance of the meeting, shall state that the purpose, or one of the purposes, of the meeting is the removal of the executive board member.
- B. Resignation-** Any executive board member may resign at any time by delivering a written resignation to the President and Secretary. A resignation is effective when the notice is received unless the notice specifies a later effective date. If a resignation is made effective at a later date, the executive board may fill the pending vacancy before the effective date if the board provides that the successor does not take office until the effective date. If the president wishes to resign, they shall submit a letter of resignation to the Executive Board.

Article XI: Nominations and Elections

Section 1. Nominating Committee

- A. Composition.** The Nominating Committee shall consist of **Three (3)** members of this PTA.
(Three, Five, or Seven)

The president may not serve as a member of the Nominating Committee. The nominating committee shall be elected by the members of this PTA at a general membership meeting at least two (2) months prior to the election officers. The Nominating Committee shall elect its own chair.

- B. Duties.** The Nominating Committee:

1. Send out a request for nominations via e-mail for all officer positions to all members of this PTA;

2. Shall consider all candidates for elected positions whose names and qualifications are received by the committee by a deadline to be determined by the Nominating Committee;
3. May consider additional candidates during its deliberations;
4. Shall obtain written consent of each candidate prior to placing the name in nomination; and
5. Shall submit only one name for each position to be filled.

C. Report. The Nominating Committee shall publicize, or cause to be publicized via e-mail, the report at least thirty (30) days before the election of officers.

Section 2. Nominations from the Floor. Nominations from the floor shall be accepted at the election meeting. Nominees from the floor shall be current members of this PTA and shall have submitted prior written consent or shall provide written consent at the time of nomination.

Section 3. Elections. Elections shall occur at the Annual Meeting by written ballot of those members present and voting. A majority vote will elect. When there is only one (1) candidate, that election shall be held by voice vote.

Article XII: Committees

Section 1. Committees.

A. Creation. The executive board shall create such standing and special committees as deemed necessary to promote the purposes of this PTA and appoint the chairperson for all committees.

B. Standing Committees. The standing committees of this PTA shall be:

Membership/Directory, Newsletter, Social Media, Technology/Website
--

(List all Standing Committees Above)

C. Composition. Only members of this PTA shall be eligible to serve as a member of any committee. The term of each committee shall be one (1) year or until a successor is appointed. The chairperson shall not be eligible to serve more than three (3) consecutive terms as the chairperson of the same committee unless the position is posted and a successor cannot be found.

D. Chairperson Duties. The committee chairperson shall:

1. Present a plan of work to the executive board for approval;
2. Coordinate all work of the committee;
3. Perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the Executive Board or the association; and
4. Upon the expiration of the term of office or when individuals cease to hold the position, they shall automatically be relieved of all duties and responsibilities. All records, books, and other materials pertaining to the position shall be turned over to the president and all funds pertaining to the position shall be returned to the treasurer within fourteen (14) days.

Article XIII: General Membership Meetings

Section 1. Regular Meetings.

- A.** This PTA shall hold a minimum of three (3) general membership meetings during the membership year. A general membership meeting may be held electronically.
- B.** Dates of general membership meetings shall be determined by the executive board and announced at the first general membership meeting of the year, as well as through all communication channels used by this PTA.
- C.** Five (5) days' advance notice shall be given to the membership of a change of date.

Section 2. Annual Meeting. The annual meeting shall be held in **May** at which time the business shall
(April, May, or June)

include the election of officers by the members, preliminary annual fiscal report and presentation of next year's budget for approval by the membership. .

Section 3. Special Meetings. A special meeting of this PTA, if needed, shall be called by the president or by the majority of the executive board with three (3) days' advance notice which shall include the date, time, place and purpose for the meeting. A special general membership meeting may be held electronically. No other business shall be discussed or conducted.

Section 4. Voting. Only members of this PTA who have paid dues for the current membership year may vote on the business of this PTA. There shall not be voting by proxy.

Section 5. Quorum. The quorum for the transaction of business in any general membership meeting of this PTA shall be **6** members.
(Insert #)

Article XIV: Council Membership

This article applies only to Local PTAs that are part of a Council PTA.

This PTA shall be represented in meetings of the **Mt Lebanon** Council PTA by the president, or
(Insert Name or N/A)
appointed alternate, and by delegate(s) or alternate(s) as prescribed in the Council PTA Bylaws.

Article XV: Pennsylvania PTA Annual Meeting and Meetings of the Voting Body

Section 1. Representation at the Pennsylvania PTA Annual Meeting. This PTA shall be entitled to be represented at the Pennsylvania PTA Annual Meeting by all members of this PTA who pay the registration fee as determined by the PAPTAs Board of Directors.

- A. Purpose.** The Pennsylvania PTA Annual Meeting is held for the purpose of receiving reports and acting on any other business which is properly before its membership pursuant to its Articles of Incorporation or bylaws. The election of Pennsylvania PTA officers and region directors shall occur in even-numbered years.
- B. Voting Body.** The voting body of the Pennsylvania PTA Annual Meeting shall be composed of all members of a local PTA/PTSA chartered by the PAPTAs who have registered for the annual meeting.
- C. Voting.** Only the members who make up the voting body at the annual meeting shall have the right to introduce motions, participate in debate, or vote at such annual meetings. There shall be no proxy voting.

Article XVI: National PTA Convention

State delegates to the National PTA convention shall be selected as per the PAPTA Policy Manual and pursuant to the bylaws of the National PTA.

Article XVII: Dissolution and Withdrawal of Charter

Section 1. This PTA shall be subject to withdrawal and the status of such association as a Local PTA shall be subject to termination, in the manner and under the circumstances provided in the bylaws of the Pennsylvania PTA.

Section 2. A Local PTA considering dissolution must:

- A.** Contact PAPTA to arrange for a representative to speak in favor of continuing the PTA to the executive board members at a meeting of the executive board and at a general membership meeting at which the vote is to be taken.
- B.** Upon the decision of the executive board to recommend dissolution of the unit, that recommendation shall be presented to the members at the next general membership meeting and shall include an announcement that the vote on the dissolution will be taken at the next regular meeting (a 2/3 vote is required to dissolve);
- C.** Require that each person voting to dissolve shall have been member of this PTA/PTSA for at least ninety (90) days;
- D.** Arrange for the proper disposal of PTA/PTSA funds and property according to the provisions of these bylaws; and provide for the vote on dissolution to take effect immediately, initiating the process for final dissolution, and shall not be post-dated.

Section 3. This PTA/PTSA shall be obligated, upon withdrawal of its charter by the Pennsylvania PTA to:

- A.** Yield up and surrender all of its books and records and all of its assets and property to the Pennsylvania PTA, or to such agency as may be designated by the Pennsylvania PTA, or to another local PTA organized under the authority of the Pennsylvania PTA
- B.** Cease and desist from the further use of any name that implies or connotes association with the National PTA or the Pennsylvania PTA or status as a constituent association of the National PTA; and
- C.** Promptly carry out, under the supervision and direction of the Pennsylvania PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA/PTSA.

Article XVIII: Parliamentary Authority

This PTA shall be governed by the rules outlined in the current edition of Robert's Rules of Order Newly Revised. This applies in all situations where these rules are relevant and do not conflict with the Articles of Incorporation, these bylaws, established policies, special rules of order, or the Non-Profit Code of Pennsylvania.

Article XIX: Fiscal Year

The fiscal year of this PTA starts on July 1 and ends on June 30 of the following year.

Article XX: Amendments

These bylaws may be amended at any general membership meeting of this PTA by a two-thirds vote of the members present and voting, provided that written notice of the proposed amendment, distributed via email, has been given at least thirty (30) days prior to the meeting at which the amendment is voted upon. After adoption at a general membership meeting of this PTA, the bylaws shall be submitted to the Pennsylvania PTA for approval according to the procedures set forth by the Pennsylvania PTA. Amended bylaws go into effect when a state approved copy is returned to the president of this PTA.