

Unified Local Unit Bylaws

Oregon
PTA[®]

everychild. one voice.

Revised April 2016

UNIFIED LOCAL UNIT BYLAWS

Table of Contents

Article:	Title	Page
I:	Name.....	3
II:	Articles of Organization	3
III:	Purposes	3
IV:	Basic Policies	3
V:	Membership and Dues	4
VI:	Officers and Their Election	5
VII:	Duties of Officers	6
VIII:	Executive Committee/Board	6
IX:	Standing Committees	7
X:	Meetings.....	7
XI:	Standing Rules	7
XII:	Councils.....	8
XIII:	Relationship with National PTA and Oregon PTA.....	8
XIV:	Parliamentary Authority	10
XV:	Amendments	10
XVI:	Resolutions.....	11
XVII:	Annual State Conference and Convention	11
XVIII:	Fiscal Year.....	11

UNIFIED LOCAL UNIT BYLAWS

ARTICLE I: Name

The name of this local PTA/PTSA unit shall be the Jennings Lodge / Candy Lane PTA, a unit
(insert local unit name here)
of the Oregon Congress of Parents and Teachers (Oregon PTA), a branch of the National Congress of Parents and Teachers (National PTA).

ARTICLE II: Articles of Organization

The articles of organization of a local PTA/PTSA unit include (a) the bylaws of such organization and (b) the articles of association. In the absence of separate Articles of Association, the bylaws shall be deemed to be the Articles of Association. In the event of any conflict between these bylaws and Articles of Association, these bylaws shall govern.

*ARTICLE III: Purposes

SECTION 1. The Purposes of the local PTA/PTSA unit, in common with the Purposes of 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. The Purposes of this local PTA/PTSA unit are promoted, in cooperation with Oregon PTA and National PTA, through an advocacy and educational program directed towards parents, teachers, and the general public; developed through conferences, committees, projects, and programs; and governed and qualified by the basic policies set forth in Article IV.

SECTION 3. The organization is organized exclusively for the 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 (hereinafter "Internal Revenue Code").

*ARTICLE IV: Basic Policies

The program of this local PTA/PTSA unit:

- a. The unit shall be noncommercial, nonsectarian, and nonpartisan.
- b. The unit shall work with the schools and community to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, 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. The unit shall work to promote the health and welfare of children and youth and shall seek to promote collaboration between parents, schools, and the community at large.
- d. No part of the net earnings of the unit shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers or other private persons except that the unit 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 III hereof.
- e. Notwithstanding any other provision of these articles, the unit shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.
- f. Upon the dissolution of this local unit, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of National PTA.
- g. The organization 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 V: Membership and Dues

SECTION 1. Every individual who is a member of this local PTA/PTSA unit is, by virtue of that fact, a member of National PTA and of Oregon PTA by which this local PTA/PTSA unit is chartered, and is entitled to all benefits of such membership.

SECTION 2. Membership in this local PTA/PTSA unit shall be made available to any individual who subscribes to the Purposes and Basic Policies of National PTA, without regard to race, color, creed or national origin, under such rules and regulations not in conflict with the provisions of these bylaws and the Articles of Association these bylaws shall govern.

+SECTION 3. This local PTA/PTSA unit shall conduct an annual enrollment of members, but persons may be admitted to membership at any time.

+SECTION 4. Each individual member of the association shall pay annual dues of \$10.00 to the association. Such annual dues includes the portion of seven dollars and twenty-five cents (\$7.25) per member payable to the Oregon PTA and the portion of two dollars and twenty-five cents (\$2.25) per member payable to National PTA. Local PTA/PTSA units shall forward to the Oregon PTA nine dollars and fifty cents (\$9.50) for each membership. Two dollars and twenty-five cents (\$2.25) shall be forwarded by Oregon PTA to National PTA for each member of a local PTA/PTSA unit.

SECTION 5. Oregon PTA and National PTA portions of the dues paid by each member of the association shall be set aside by the association and remitted to Oregon PTA through such channels and at such times as the state bylaws provide. The remittance to Oregon PTA shall be accompanied by a report, in such form as may be required by Oregon PTA, showing the name and address of the treasurer of the association, the amount of fees collected during the period covered by the report, and the number of members of the association.

SECTION 6. The charter of a local PTA/PTSA unit shall be withdrawn and membership terminated for non-compliance to Oregon PTA and National PTA bylaws.

SECTION 7. The local PTA/PTSA unit shall be issued a charter when the following steps are completed: Membership dues and officers' names, addresses, phone numbers and email addresses, are on record in the Oregon PTA office.

SECTION 8. Membership dues will be forwarded to Oregon PTA on a monthly basis.

SECTION 9. The charter of a local PTA/PTSA unit shall be withdrawn and membership terminated for practices or activities that may tend to defeat the Purposes and basic policies of Oregon and National PTAs.

SECTION 10. Only members of the local PTA/PTSA unit shall be eligible to participate in the business meetings, or to serve in any of its elective or appointive positions.

SECTION 11. A PTA member shall not serve as a voting member of a constitute organization's board at the local, council, district, region, state or national level while serving as a paid employee of, or under contract to, that constitute organization.

SECTION 12. Any local PTA/PTSA unit with no dues paid by November 1st of the second year has failed to maintain status as a local PTA/PTSA and shall have their charter withdrawn by Oregon PTA.

ARTICLE VI: Officers and Their Election

+SECTION 1. Each officer of the PTA/PTSA shall be a member of this PTA.

SECTION 2. Officers and Their Election

- a. The officers of this local PTA/PTSA unit shall be a president, a president-elect if desired, one (1) or more vice presidents, a secretary, and a treasurer, and others as specified in the local PTA/PTSA unit's standing rules.
- a. Officers shall be elected by ballot vote, by the members at a general meeting, annually prior to July 1st. However, if there is but one nominee for any office, election for that office may be by voice vote.
- c. In the event that more than two candidates are running for a single office a plurality of votes shall constitute an election.
- d. Officers shall assume their official duties as specified in the standing rules.
- e. A person shall not be eligible to serve more than two (2) consecutive terms in the same office.
- f. No PTA/PTSA member shall serve in more than one (1) elected position at a time in a local PTA/PTSA

SECTION 3. Nominating Committee

- a. There shall be a nominating committee composed of at least three (3) members, to be elected by this local PTA/PTSA unit at a general meeting, at least one month prior to the election of officers. The committee shall elect its own chair.
- b. The nominating committee shall submit the name of one (1) or more candidates for each office to be filled. Additional nominations may be made from the floor with the consent of the nominee.

SECTION 4. Vacancies

An unexpired term in any elected office shall be filled by an election at a general meeting. Prior notice of a minimum of fourteen (14) days of such election must be given. If a vacancy occurs in the office of president:

- a. If there is a president elect, that person shall become the president and an election for a new president elect shall be held.
- b. If there is no president elect
 1. The vice president or first vice president shall assume the duties of president until an election can be held.
 2. If there is more than one vice president, but no first vice president, the board of said PTA/PTSA shall appoint one of the vice presidents to act as president until an election can be held.
- c. If there is no president-elect and no vice president, the secretary shall assume the duties of president until as election can be held.

SECTION 5. Removal from Office

- a. Any elected officer or board member may be removed from office at any time in accordance with the Oregon Non-Profit Corporations Act as amended from time to time. Such elected officers or board members may be removed with or without cause, or for acts, including, but not limited to, failing to perform duties, criminal conduct, acts of moral turpitude, etc.
- b. The number of votes required to remove an elected officer is equal to the number of votes necessary to elect an officer (a majority).
- c. Two (2) consecutive unexcused absences (as defined in the Standing Rules of the Oregon PTA Board of Directors) from required meetings shall be deemed equivalent to a resignation of office.

ARTICLE VII: Duties of Officers

SECTION 1. The president shall preside at all meetings of the local PTA/PTSA unit and shall be an ex-officio member of all committees, except the nominating committee, on which the president shall not serve; shall appoint special committees, except the nominating committee; shall send to the Oregon PTA office and the Council president the name, address, and phone numbers of the newly elected officers immediately; and shall coordinate the work of the officers and committees of the local PTA/PTSA unit in order that the Purposes may be promoted.

SECTION 2. In the absence or inability of the president to serve, the president-elect or vice-presidents in their order shall temporarily perform the duties of the president; shall assist the president when called upon.

SECTION 3. The secretary shall record the minutes of all meetings of the local PTA/PTSA unit, board and executive committee; shall keep a complete roster of members and the membership of all standing committees. In the absence of the president and the vice-president(s) or their inability to act, the secretary shall temporarily perform the duties and exercise the powers of the president.

SECTION 4. The treasurer shall keep an accurate record of all income and expense of the local unit in relation to the units approved yearly budget and shall provide and present a financial statement at each regular meeting and as requested by anyone. The treasurer shall ensure that funds are disbursed only as authorized by a vote of the executive committee or association, and that all checks and vouchers are signed by two persons who are not related to each other or the payee and who do not reside in the same household as the other signer or payee.

The treasurer's accounts shall be examined annually by an auditor or an auditing committee, who, satisfied that the treasurer's annual report is correct, shall sign a statement of that fact at the end of the report. The audit committee shall be selected by the executive board in sufficient time to meet unit in good standing requirements.

In the absence of the president, the vice president(s) and the secretary or their inability to act, the treasurer shall temporarily perform the duties and exercise the powers of the president.

SECTION 5. Additional duties for officers may be specified in the standing rules. (See Model Standing Rules in Officer's Handbook.)

ARTICLE VIII: Executive Committee/ Board

SECTION 1. The executive committee shall consist of the elected officers of the local PTA/PTSA unit.

SECTION 2. The board shall consist of the officers of the local PTA/PTSA unit and chairs of standing committees.

SECTION 3. The duties of the executive committee/board should be:

- a. To transact necessary business in the intervals between association meetings and such other business as may be referred to it by the local PTA/PTSA unit.
- b. Create special committees.
- c. Approve the plans of work of the standing committees.
- d. Present a report at the regular meetings of the local PTA/PTSA unit.
- e. Select an auditor or an audit committee to audit the treasurer's accounts.
- f. Prepare and submit to the local PTA/PTSA unit for adoption a budget for the year.
- g. Approve expenditures within the limits of the budget.

SECTION 4. Regular meetings of the board shall be held during the year; the time to be fixed by the board at its first meeting of the year. A majority of the board shall constitute a quorum. Special meetings of the executive committee/board may be called by the president or by a majority of the respective members of the executive committee/board, with due notice being given.

SECTION 5. The executive committee shall appoint the chairs of the standing committees. The newly elected executive committee, not yet in office, is authorized to meet for the purpose of appointing chairs of standing committees.

ARTICLE IX: Standing Committees

SECTION 1. Such standing committees shall be created by the executive committee as may be deemed necessary to promote the Purposes and interests of the local PTA/PTSA unit.

SECTION 2. At the beginning of each administration, the chairs of the standing committees shall be elected by the executive committee.

SECTION 3. The term of standing committee chairs shall be for one year or until their successors shall be selected.

SECTION 4. The chair of each standing committee shall present a plan of work to the executive committee/board for approval. No committee work shall be undertaken without the consent of the executive committee/board.

SECTION 5. Chairs of all standing committees shall be members.

SECTION 6. Special committees may be appointed by the president when such committees are deemed necessary by the executive committee/board or the local PTA/PTSA unit.

SECTION 7. The quorum of any committee shall be a majority of its members.

SECTION 8. The president shall be an ex-officio member of all committees except the nominating committee.

ARTICLE X: Meetings

SECTION 1. Regular meetings of this local PTA/PTSA unit shall be held during the school year to conduct necessary business, which shall include adoption of the budget, election of the nominating committee, and election of officers. Dates of meetings shall be determined by the executive board.

***SECTION 2.** Voting by proxy is prohibited.

***SECTION 3.** A quorum for any regular meeting of this association shall be four (4).
(insert quorum here)

ARTICLE XI: Standing Rules

SECTION 1. Local units shall be eligible for membership in only one council.

SECTION 2. There shall be Standing Rules, adopted by this local PTA/PTSA unit, for guidance in matters not covered in these bylaws. The Standing Rules shall not be inconsistent with these bylaws and shall be reviewed annually by the executive committee/ board. Proposed amendments or additions shall be presented to the general membership of this PTA/PTSA unit for adoption.

SECTION 3. The procedure for amending standing rules shall be incorporated in the body of the standing rules.

SECTION 4. A copy of this local PTA/PTSA unit's standing rules shall be sent to the Oregon PTA office to remain on file until the next amendment when an update shall be sent.

ARTICLE XII: Councils

SECTION 1. This local PTA/PTSA unit shall be eligible for membership in the Clackamas council and shall be represented in general meetings of the council PTA by the president or alternate, and by delegates or their alternates as specified in the Unified Bylaws for Council, Article VI.

SECTION 2. Delegates shall be chosen according to the local PTA/PTSA unit's standing rules.

ARTICLE XIII: Relationship with National PTA and Oregon PTA

SECTION 1. This local PTA/PTSA unit shall be organized and chartered under the authority of Oregon PTA, in conformity with such rules and regulations, not in conflict with the National PTA Bylaws, as Oregon PTA in its bylaws prescribe. Oregon PTA shall issue to this local PTA/PTSA unit an appropriate charter evidencing the due organization and good standing of this PTA.

SECTION 2. Oregon PTA requirements of a local PTA/PTSA unit:

- a. Each local PTA/PTSA unit must have current copies of the following items on file at the Oregon PTA office annually by November 30th:
 1. Current officers list
 2. Standing rules
 3. Approved annual budget
 4. Membership lists and fees first list and thereafter monthly
 5. Federal Employer Identification Number (EIN) (new units only)
 6. Year-end financial statement
 7. Copy of Annual Audit Report
 8. Copy of IRS 990
 9. National PTA identification number (new units only)
 10. Copy of CT-12 due by Nov. 30
 11. Local PTA/PTSA units are required to purchase general liability and bonding insurance through the Oregon PTA's current carrier or provide proof of equivalent coverage.
- b. Each local PTA/PTSA practices responsible financial procedures as referenced National PTA and Oregon PTA.

- c. Each local PTA/PTSA unit shall avail itself of the workshops, conferences, resources and opportunities for leadership development authorized by the region, state and national levels of PTA, with a minimum of three (3) elected officers or their designees attending one (1) leadership training session annually. Leadership training is defined as:
 - 1) Designated annual conference and convention workshops.
 - 2) Oregon PTA sponsored officer training.
 - 3) Council sponsored officer training.
 - 4) Other training as pre-authorized by the Oregon PTA Leadership Committee.
- d. Each local PTA/PTSA unit shall attain a minimum of 25 members as of December 31st of the current membership year. Newly organized units shall have until December 31st of their second membership year to attain the minimum.
- e. A local PTA/PTSA unit may apply to the Oregon PTA Board of Directors for a waiver of the time limitation in Article XIII: Section 2d, in the event of hardship.

SECTION 3. Oregon PTA procedures when local PTA/PTSA units fail to comply with requirements:

- a. If all documents required under Article XIII, Section 2, subsection (a) are not submitted by November 30th the local unit shall receive a written notice indicating missing items and the Region Director shall contact said local PTA/PTSA officers.
- b. If all documents required under Article XIII, Section 2, subsection (a) are not submitted by November 30th of the second year, Oregon PTA shall withdraw the charter of the local PTA/PTSA unit.

+SECTION 4. This local PTA/PTSA unit shall adopt such bylaws for the government of the organization as may be approved by Oregon PTA. Such bylaws shall not be in conflict with the Bylaws of National PTA or the bylaws of Oregon PTA.

+SECTION 5. This local PTA/PTSA unit shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts, and disbursements of the local PTA/PTSA unit, including, specifically, the number of its members, the dues collected from its members, and the amount of dues remitted to Oregon PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of Oregon PTA or, where directed by a duly authorized representative of National PTA.

+SECTION 6. The charter of the local PTA/PTSA unit shall be subject to withdrawal and the status of this local PTA/PTSA unit shall be subject to termination, in the manner and under the circumstances provided in the bylaws of Oregon PTA.

+SECTION 7. Each local PTA/PTSA unit is obligated, upon withdrawal of its charter by Oregon PTA:

- a. To yield up and surrender all its books and records and all of its assets and property to the Oregon PTA or to such agency as may be designated by Oregon PTA, or to another local PTA/PTSA unit organized under the authority of Oregon PTA;
- b. To cease and desist from further use of any name that implies or connotes association with National PTA or Oregon PTA or status as a constituent organization of National PTA; and
- c. To carry out promptly, under the supervision and direction of the state PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA.

SECTION 8. A local PTA/PTSA unit shall be dissolved according to the procedures outlined in the *Dissolution/Disaffiliation of a Local PTA/PTSA Unit*¹, which includes, but is not limited to:

¹ A copy of the full set of dissolution procedures contained in *Dissolution Disaffiliation of a Local PTA/PTSA Unit* may be obtained by written request to the Oregon PTA office (4506 SE Belmont, Suite 108B, Portland, OR. 97215).

- a. The executive committee, board or general membership shall adopt a resolution recommending that the local PTA/PTSA unit shall be dissolved and directing that the question of such dissolution be submitted to a vote at a special meeting of members having voting rights as of the date that the resolution is adopted. Written or printed notice, stating the date, time, place and that the purpose of such a meeting is to consider the advisability of dissolving the local PTA/PTSA unit, shall be given to each member entitled to vote at such a meeting at least forty-five (45) days prior to the date of such meeting.
- b. Written notice of such resolution, accompanied by a copy of the notice of the special meeting of members, shall be given to the president of Oregon PTA, at least thirty (30) days before the date set for such special meeting of members.
- c. Only those persons who were members in good standing of the local PTA/PTSA unit on the date and time of the meeting that the resolution to dissolve is approved shall be eligible to vote on the question of dissolution.
- d. Approval of dissolution of the local PTA/PTSA unit shall require the affirmative vote of at least two-thirds (2/3) of the eligible membership, present and voting.
- e. Upon dissolution/disaffiliation each local PTA/PTSA unit, after adequately providing for the debts and obligations of the organization, must surrender all remaining assets and property to Oregon PTA or to another local PTA/PTSA unit organized under the authority of Oregon PTA.

SECTION 9. The charter of the local PTA/PTSA unit shall be withdrawn and membership terminated immediately after completion of steps in Article XIII, Section 8.

+ARTICLE XIV: Parliamentary Authority

The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall govern National PTA and its constituent organizations in all cases in which they are applicable and in which they are not in conflict with these bylaws, the bylaws of Oregon PTA, and the bylaws of National PTA, or the articles of incorporation.

*ARTICLE XV: Amendments

SECTION 1.

- a. Any member or constituent body of Oregon PTA may submit suggested amendments, including rationale, to the Oregon PTA Bylaws Committee postmarked by January 15th.
- b. The submitted amendments will be reviewed by the Bylaws Committee, which will determine whether to present it to the Board of Directors at their winter meeting for approval. If presented and approved the submitted amendments become the proposed amendments.
- c. These bylaws may be amended at any general meeting of the Oregon PTA annual state conference and convention by a two-thirds ($\frac{2}{3}$) vote of its delegates present and voting, provided that thirty (30) days written notice of the proposed amendment, in its entirety, has been given in the call to annual state conference and convention.
- d. Submitted amendments, if not approved by the board of directors, may be brought to the annual state conference and convention body providing those delegates present and voting approve of its consideration by a three-fourths ($\frac{3}{4}$) vote. Notice of intention to submit an amendment shall be sent to the Oregon PTA president and the Oregon PTA office by March 1st preceding the annual state conference and convention.

SECTION 2. The adoption of an amendment by National PTA, to any single starred bylaws shall serve automatically and without the requirement of further action by Oregon PTA or local PTA/PTSA units to change such bylaws. Local PTA/PTSA units shall promptly incorporate such amendments in their respective bylaws.

SECTION 3. The adoption of an amendment by Oregon PTA, to any bylaw identified with a plus (+) sign shall serve automatically and without further action by local PTA/PTSA units to change such bylaws. Local PTA/PTSA units shall promptly incorporate such amendments in their respective bylaws.

ARTICLE XVI: Resolutions

SECTION 1. Definition:

- a. State resolutions are a call for action regarding problems, situations or concerns that affect children and youth statewide. A resolution is a motion which, because of its importance, is submitted in writing. A resolution shall consist of two parts: a preamble, the whereas clause(s) and a request for action, the resolved clause(s).

SECTION 2. Submitting Process:

- a. Resolutions shall originate only from local PTA/PTSA units, councils, or Oregon PTA Board of Directors, their appointed committee chairs or Executive Committee. In each case, the Resolution shall be signed by the president and the secretary of the submitting local PTA/PTSA unit or council, or chair of the State committee.
- b. Resolutions from local PTA/PTSA units and councils shall be forwarded to Oregon PTA postmarked by December 31st.
- c. All resolutions will be reviewed by the Resolutions Committee. The committee will submit all resolutions to the Executive Committee, and submit to the Board of Directors those resolutions it considers pertinent and within the scope of National PTA and Oregon PTA Policies and Program.
- d. With the approval of the Board of Directors, the Resolutions Committee will submit to the annual state conference and convention delegates all resolutions recommended for consideration.
- e. Rejected Resolutions
 1. The Resolutions Committee shall notify, by March 1st, the group that submitted said resolution of the rejection and the reasons for the rejection.
 2. A rejected resolution may be brought to the annual state conference and convention floor with a two-thirds (2/3) affirmative vote of the annual state conference and convention delegates to consider the resolution, providing notice of such intention to submit the resolution has been presented to Oregon PTA no later than March 15th.
- a. Emergency Resolutions
 1. The urgency of the subject matter shall have arisen after the deadline for submission of a resolution.
 2. Emergency resolutions shall conform to all established criteria for other resolutions.
 3. Six (6) copies of the emergency resolution must be submitted to the state president prior to the opening of the first general session.
 4. Sufficient copies for the entire delegation must be furnished by the end of the first general session by the delegate presenting the resolution.
 5. A two-thirds (2/3) affirmative vote of the delegate body is necessary before an emergency resolution shall be considered.

Article XVII: Annual State Conference and Convention

SECTION 1. Each local PTA/PTSA unit shall be entitled to be represented at the annual state conference and convention by its president or alternate and one (1) delegate per membership of twenty-five (25) or less and one (1) additional delegate for each twenty-five (25) thereafter, this number to be determined by the membership records in the Oregon PTA office as of March 1st.

SECTION 2. New PTA/PTSA units organized on, or after, March 1st shall be entitled to representation as described above, with the number of delegates to be determined by dues received from March 1st through forty-eight (48) hours prior to the opening of annual state conference and convention.

The selection of the delegates and their alternates shall be made according to the standing rules of the local PTA. A delegate must be a member of the local PTA/PTSA unit at the time he/she is elected to be a delegate.

ARTICLE XVIII: Fiscal Year

SECTION 1. The fiscal year shall be July 1st through June 30th.