

**Thirty-Third District**



# Parliamentarian Training

## Bylaws and More

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Gabrielle Cohen, Thirty-Third District PTA Parliamentarian

**Thirty-Third District PTA Fall Officers Training**  
Saturday, August 9, 2025

# Agenda

- Introductions
- Parliamentarian Job Description
- Parliamentary Law and Procedure
- Motions and Voting
- Bylaws and Standing Rules
- Bylaws Review and Submission
- Nominating Committees and Elections
- Questions and Resources

# Introductions

**Gabrielle Cohen**  
**Parliamentarian**

parliamentarian@33rdpta.org  
www.33rdpta.org

# Parliamentarian Job Description

- Advise president in managing meetings and on parliamentary procedure
- Chair Bylaws Committee to review every year and revise at least every five years
- Arrange Nominating Committee's first meeting and give direction on nomination and election process
- Understand your unit's bylaws and be able to explain them to your members and executive board
- Have basic knowledge of Robert's Rules of Order so you can advise the president
- Help set up ground rules for meetings, run meetings efficiently (e.g., be a timekeeper, keep a speakers list)
- Keep track of motions and make sure everything runs smoothly while ensuring everyone is heard
- Advise the Nominating Committee and president with regard to nominations and elections

# Parliamentary Law

- ❑ ORDER - One business item at a time
- ❑ EQUAL OPPORTUNITY - Chance for everyone to participate
- ❑ JUSTICE - Fairness; everyone understands
- ❑ RIGHT OF MINORITY - to be heard
- ❑ RIGHT OF MAJORITY - to decide

# Parliamentary Procedure

Parliamentary procedure is a time-tested method of conducting business at meetings. Robert's Rules of Order (most current edition) is the accepted reference standard. Our bylaws supersede Robert's Rules of Order.

Making a motion is an important part of procedure.

MOTIONS are made for a PTA to take action for plans, programs, and activities. They are introduced, seconded, discussed, and voted on by members at a meeting. Only a member can make a motion.

The parliamentarian is responsible for making sure there is a quorum before any motion is made.

# Parliamentary Facts

- Robert's Rules of Order, Newly Revised is the parliamentary authority for PTA
- A PTA position can only be filled by one person
- One position = one vote
- Bylaws can NOT be suspended, but standing rules can
- Any action (spending money, adopting programs, etc.) to be taken requires a motion
- Only one action (motion) can be considered at a time
- PTA bylaws define separate meeting groups; only members of that group have the right to attend that meeting unless granted a courtesy seat
- Special meetings may be called in between regularly scheduled ones
- Voting by proxy is NEVER allowed
- Only members of that organization or meeting group may make motions, discuss, or vote
- The chair is impartial: does not make motions or vote (unless a tie)

Eight Steps of a Motion: to legally participate in the process an individual must have been a member for at least 30 days

1. Wait - Stand or raise hand until chair calls on you; obtain floor
2. Be Recognized - Chair calls on member
3. Make the Motion - Member presents motion, "I move..."
4. Obtain a Second - Another member shows support
5. Restate the Motion - Chair places the question on the floor
6. Discussion - Members discuss with *equal opportunity*
7. Vote - Chair asks for vote: "All those in favor say, 'aye' " etc.
8. Results Announcement - Chair says 'approved' or 'failed'



# Amending Motions

- Insert or add words
- Strike words
- Strike words and insert others
- Substitute one paragraph for another

You must vote on the amendment and then restate the amended original motion for a separate vote.

# Motions: Voting Methods

- Voice vote
- Show of hands vote
- Roll call
- Ballot
- General consent

Voting by proxy is prohibited.

Actions taken in violation of the bylaws are null and void.

Non-members may not make motions, debate, or vote.

# Bylaws

1. Legally binding document/set of rules that governs your PTA
  - a. each unit, council, district, state, and National has their own bylaws that overlap and must not conflict
  - b. if you are out of compliance with your bylaws, you are operating illegally
2. These rules cannot be changed except by special process
  - a. National, state, or district makes a change that gets handed down to us (double and triple starred items); must be implemented immediately
  - b. you can 'update your bylaws'
    - i. a specific process that takes a few months
    - ii. requires a committee to be formed, votes to be taken, and approval by both the executive board and the association.
3. These rules can NEVER be suspended

# More about Bylaws

Who gets a copy?

- President, secretary, and parliamentarian
- Executive board members
- Any member upon request may review a copy

When to update?

- Review annually
- Update at least every five years

# Explanation of Starred Articles and Sections

Articles and Sections designated with a double star sign (\*\*) indicate provision in the bylaws that are required by the California Corporations Code.

Triple stars (\*\*\*) indicate provisions in the bylaws of the California State PTA and National PTA that are to be included in unit, council and district PTA bylaws where appropriate.

# Bylaws

**BYLAWS  
FOR LOCAL PTA/PTSA UNITS**

<p><b>1</b> → <u>00000000</u> National PTA Identification Number</p> <p><b>3</b> → <u>Sunshine Elementary PTA</u> Name of Association</p> <p><b>5</b> → <u>XYZ Council</u> Council PTA</p> <p><u>33rd District PTA</u> District PTA</p> <p><u>000 Any Street</u> Address of School - Street</p> <p><u>Somewhere, 00000</u> City - Zip Code</p> <p><b>7</b> → <u>Transitional Kindergarten - Fifth Grade</u> Grades in School</p> <p><b>8</b> → <u>January 1, 2023</u> Organization Date of This Association</p>	<p><b>2</b> ← <u>0000</u> California State PTA Identification Number</p> <p><b>4</b> ← <u></u></p> <p><b>6</b> ← <u></u></p>
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REVISED FEBRUARY 2022

**California State**  
**PTA**  
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# PTA Bylaws Articles

- I. Name
- II. Purposes
- III. Basic Policies and Principles
- IV. Membership and Dues
- V. Officers and their Election
- VI. Duties of Officers and Chairpersons
- VII. Association Meetings
- VIII. Executive Board
- IX. Council Membership

# PTA Bylaws Articles (continued)

- X. Charter Procedure
- XI. Relationships
- XII. Articles of Organization
- XIII. Identification Numbers and Fiscal Year
- XIV. Parliamentary Authority
- XV. Amendments

Signatures Page

Standing Rules



# Bylaws Review Process

- The president appoints a bylaws committee.
- The committee reviews the bylaws.
- The committee completes a set of the most current *Bylaws for Local PTA/PTSA* (using the fillable bylaws).
- The parliamentarian prepares and presents the recommendations to the executive board.
- The executive board votes, and the outcome is recorded in the minutes.
- The parliamentarian completes the Bylaws Submittal form listing all amendments including amendments to the standing rules and emails it along with the bylaws to the council parliamentarian.

# Process (continued)

- The council parliamentarian must review all unit bylaws before they are submitted to district.
- The district parliamentarian will submit the bylaws to the state parliamentarian.
- Upon return from state, the district parliamentarian will send them on to the council or unit (if out of council).
- Once the unit receives them, the members must be given written notice of the bylaws amendments at least 30 days in advance of the association meeting to adopt the updated bylaws.
- If the association votes to adopt the bylaws, the president and recording secretary sign and date them and send the signature page back to council to submit to the district.

# Article I – Name

The name of this association is Sunshine Elementary PTA, a Parent-Teacher-~~Student~~ Association, hereinafter referred to as the “Association”, located in the city of Sunnyville, a local association of the Suntown Council, Forty-fifth District of the California Congress of Parents, Teachers, and Students, Inc. (California State PTA), a branch of the National Congress of Parents and Teachers (National PTA).

## \*\*\*Article II – Purposes

- This article states the purpose of the organization
- No changes except to fill a blank

## \*\*\*Article III – Basic Policies and Principles

- This article outlines the basic policies and principles
  - o Noncommercial
  - o Nonsectarian
  - o Nonpartisan

# Article IV – Membership and Dues

- SECTION 4. Each member of this Association shall pay annual dues of ten dollars ~~and cents~~ (\$10.00) per member (also means per capita) to the Association.
  - o Extra room here for staff/faculty/student dues structures
  - o If using the paper or fillable templates, check your math
  - o Includes membership due dates – set by your council and district

# Article V – Officers and Their Election

- SECTION 2. The officers of this Association shall be a **president**, *executive vice president*, (\_\_\_\_) vice presidents, *recording secretary*, *corresponding secretary*, **treasurer**, *financial secretary*, auditor, historian, and parliamentarian. These officers shall be elected annually with the exception of the *corresponding secretary and the parliamentarian*, who shall be appointed by the president subject to the ratification of the executive board.
  - o Nominating committee and election information in this article
  - o Also filling vacancies in office is addressed here

# Article VI – Duties of Officers and Chairs

- \*\*\*SECTION 1. The officers and chairs of committees of this Association must follow and abide by the responsibilities, duties and procedures for officers and chairs as prescribed in the California State PTA Toolkit.
- SECTION 4. All disbursements of the association must be signed by two (2) authorized signers. Authorized signers are: president, treasurer, \_\_\_\_\_, and \_\_\_\_\_ *[one or two elected officers other than the secretary or auditor]*. The authorized signers and any members counting cash/checks shall not be related by blood or marriage nor reside in the same household.

# Article VII – Association Meetings

- Most information about association meetings is here.
  - o Annual election meeting
  - o Special meetings
  - o Quorum required
- SECTION 5.
  - \*\*b. Eleven (11) ~~number~~ members shall constitute a quorum. If this bylaw provision authorizes a quorum of less than one-third (1/3) of the voting power, then only those matters the general nature of which was contained in the notice of the meeting may be voted upon at such meeting.



# Article VIII – Executive Board

- Who is on the executive board?
- Executive board responsibilities
- Meeting requirements
- Quorum
- Special meeting notifications

# Article IX – Council Membership

- States name of council
- States the association members who attend council meetings
  - o How those delegates are selected
  - o Term of service for those delegates
- Out-of-council associations: line out this entire article and renumber remaining articles

# Article X – Charter Procedure

Requirements for a unit “In Good Standing” include:

- Adheres to purposes and principles of PTA
- Remits dues and insurance premium
- Minimum members including required officers
- Up-to-date with government filings
- Current bylaws (within the last 5 years)

# \*\*\* Article XI – Relationship with National PTA and California State PTA

- California State PTA Toolkit has policy statements not found in bylaws or standing rules – **but** we are obligated to follow those statements.

# \*\*\*Article XII – Articles of Organization

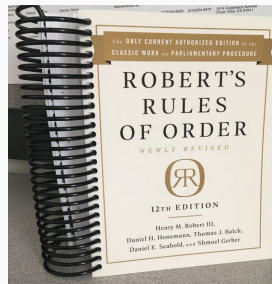
- One paragraph for PTAs that are incorporated
- The other paragraph for PTAs that are not incorporated
- Articles of Organization are Articles of Incorporation – banks are sometimes confused

# Article XIII – Identification Numbers and Fiscal Year

- States five – maybe six – ID numbers important to every PTA
- States fiscal year – always a twelve-month period

# \*\*\*Article XIV – Parliamentary Authority

- *Robert's Rules of Order* - Newly Revised, 12<sup>th</sup> Edition
- Provides authority for those items not covered in your bylaws and standing rules
- The *Bylaws for Local PTA/PTSA Units* always take precedence over *Robert's Rules of Order*



# Article XV – Amendments

- Outlines the amendment process
- \*\*\*Section 4. Explains that \*\*\* indicate California State PTA requirements
- \*\*\*Section 5. Explains that \*\* indicate California Corporate Code requirements



# Signature Page

- State parliamentarian signs first
- Unit president and secretary sign and date following association adoption

# What Are Standing Rules?

1. Set of guidelines that detail how your unit chooses to carry out their day-to-day activities
  - a. Each unit, council, and district has their own standing rules that overlap and must not conflict
  - b. Council and district
2. These guidelines can be changed every association meeting if desired.
  - a. You cannot change the standing rules from council, district, or state...just for your own unit.
  - b. You need a  $\frac{2}{3}$  vote with no notice of the vote, or a majority vote if 30-days' notice was given.
3. These guidelines CAN be suspended, as they are just guidelines. You must make a motion to suspend them.

# Standing Rules

1. Bylaws
2. Membership List
3. Board Roster
4. Annual Report
5. Vice Presidents
6. \*\* Association Meeting Dates
7. \*\* Association Meeting Agenda
8. Association Meeting Business Items
9. Approving Material for Association Meetings
10. Executive Board Meeting Date

# Standing Rules continued

11. Executive Board Meeting Agenda
12. Authorization for Expenditures
13. Procedure Records
14. \*\*\* Committees
15. (ability to have virtual meetings)
16. Committee Chairs
17. Standing Committees
18. Council Assessment

## Note:

- Standing rules may be adopted by a majority vote of the members present at any association meeting. Amendments to standing rules require a two-thirds (2/3) vote of the members present without prior written notice, and a majority vote of the members present with 30-days' notice. Standing rules should be procedural rather than parliamentary and may not conflict with or supersede the bylaws.

# Where Do We Keep the Bylaws and Standing Rules?

Bylaws may NOT be posted electronically, so do not post on your website!!!

- Originals go to your unit president, unit secretary, and unit parliamentarian. (sign them!)
- Copies should go to all executive board members
- Copies may be reviewed by any PTA member that requests
- You MAY email electronic copies!

# Nominating Committee

- Elected by the association at least 60 days prior to election
- Unique committee
- Last year's members ineligible
- Serves until the election

The parliamentarian calls the first meeting of the nominating committee. They give instructions and run the election of the committee chair. If not elected to the committee, the parliamentarian leaves at this point.

# The Nominating Committee Report

- Signed by all committee members
- Submit to association at least 28 days prior to election meeting
- Report may be mailed to members or posted (or usually both)
- Chair reads at association meeting

# Election

## Your bylaws stipulate

- Month/day of the election
- Who can vote (membership list)
- Quorum required
- No proxy votes
- Nominations from the floor
- Ballot vote

## Election meeting procedures

- President presides
- Parliamentarian reads bylaws sections
- Slate is presented by Nominating Committee chair, then petitions are taken (if incorporated), then nominations from the floor



# Election (continued)

## Election by Voice Vote

- only if one candidate for each position
- only if there is no objection

## Election by Ballot

- if ANY member requests a ballot vote
- if there is more than one candidate for a position

NO DEBATE....just do it!

## Tellers

- Appointed before the meeting by the president
- Chosen for honesty, accuracy, neutrality, and dependability
- Never nominees or small children
- Announced just before the election
- Distribute ballots, count voters
- Collect and count ballots, prepare a written teller report, and deliver to president

# Questions?



# Resources

- ❑ Your Unit/Council Bylaws
- ❑ Thirty-Third District PTA [www.33rdpta.org](http://www.33rdpta.org)
- ❑ Thirty-Third District Parliamentarian [parliamentarian@33rdpta.org](mailto:parliamentarian@33rdpta.org)
- ❑ California State PTA Website (including Toolkit)  
[www.capta.org](http://www.capta.org)  
[www.capta.org/pta-leaders/run-your-pta/toolkit/](http://www.capta.org/pta-leaders/run-your-pta/toolkit/)  
[www.capta.org/pta-leaders/services/ebylaws](http://www.capta.org/pta-leaders/services/ebylaws)  
[leaders.capta.org](http://leaders.capta.org)
- ❑ National PTA Website  
[www.pta.org](http://www.pta.org)

# Thank you for coming!

Gabrielle Cohen  
Thirty-Third District PTA  
Parliamentarian  
[parliamentarian@33rdpta.org](mailto:parliamentarian@33rdpta.org)