



UNIFORM BYLAWS FOR OKLAHOMA LOCAL PTA UNITS

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ARTICLE I: NAME

The name of this unit shall be the _____ Parent Teacher Association (PTA) of _____ Oklahoma. It is a local PTA organized under the authority of the Oklahoma Congress of Parents and Teachers (Oklahoma PTA), a branch of the National Congress of Parents and Teachers (National PTA). Local units with student membership may be named Parent, Teacher, and Student Associations (PTSA).

ARTICLE II: PURPOSES

Section 1. The purposes of this PTA, in common with those of National PTA and Oklahoma PTA are:

- a. To promote the welfare of children and youth in home, school, and place 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 National PTA, Oklahoma PTA and this PTA are promoted through an advocacy and educational program directed toward 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 III.

Section 3. The association 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 referred to as "Internal Revenue Code").

ARTICLE III: BASIC POLICIES

The following are basic policies of this PTA in common with those of National PTA and Oklahoma PTA:

- a. The association shall be noncommercial, nonsectarian, and nonpartisan.
- b. The association 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 association shall work to promote the health and welfare of children and youth, and shall seek to promote collaboration among parents, schools, and the community at large.
- d. No part of the net earnings of the association shall inure to the benefit of, or be distributed to, its members, directors, trustees, officers or other private persons 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 III hereof.

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- e. Notwithstanding any other provisions of these articles, the association shall not carry on any other activities not permitted to be carried on (1) by an association exempt from federal income tax under Section 501[c] [3] of the Internal Revenue Code, or (2) by an association, contributions to which are deductible under Section 170[c] [2] of the Internal Revenue Code.
- f. 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 OKLAHOMA PTA

Section 1. This PTA shall be organized and chartered under the authority of Oklahoma PTA in conformity with such rules and regulations, not in conflict with National PTA bylaws, as Oklahoma PTA may in its bylaws or standing rules prescribe. Oklahoma PTA shall issue to this local PTA an appropriate charter evidencing the due association and good standing of this local PTA.

A local PTA in affiliation with Oklahoma PTA is one that: Adheres to the purposes and basic policies of PTA, files appropriate tax documents with the IRS and remits to Oklahoma PTA the following by October 31st each year:

- a. National portion of the dues as prescribed by National PTA
- b. Oklahoma portion of the dues as prescribed by Oklahoma PTA
- c. A copy of current Authorization for Group Tax Exemption (EIN)
- d. A copy of current unit standing rules
- e. A copy of a current Financial Reconciliation Report
- f. A list of current officers

Section 2. The charter of 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 by the bylaws and standing rules of Oklahoma PTA.

Section 3. This PTA 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 association, including specifically, the number of its members, the dues collected from its members, and the amount of dues remitted to Oklahoma PTA. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of Oklahoma PTA or, where directed by the committee on state and national relationships, by a duly authorized representative of National PTA.

Section 4. This local PTA is obligated, upon withdrawal of its charter by Oklahoma PTA:

- a. To yield up and surrender all of its books and records and all of its assets and property to Oklahoma PTA or to such agency as may be designated by the Oklahoma PTA, or to another local PTA organized under the authority of Oklahoma PTA.

Such books and records shall include but not be limited to the following:

1. Local Unit Charter (certificate issued upon association of local PTA unit).
2. PTA materials received from Oklahoma or National PTA (i.e., membership cards, manuals or resource materials, educational informational kits, training materials, mailings, convention materials, etc.).
3. PTA publications (i.e., National PTA magazine, legislative publications, Oklahoma PTA newsletters, etc.).

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4. Copies of the following (if not already on file in the Oklahoma PTA office):
 - (i) Uniform Local PTA Unit Bylaws (with blanks filled in);
 - (ii) Standing Rules;
 - (iii) Budget;
 - (iv) Minutes from preceding 12 months;
 - (v) Financial statements from preceding 12 months;
 - (vi) Year-end Financial Statement;
 - (vii) Copy of bank statements from preceding 12 months;
 - (viii) Final IRS Form 990 (if required to file);
 - (ix) Copy of IRS Employer Identification Number (EIN).
 5. Any and all cards or certificates granting the local unit special exemptions or privileges based on its affiliations with Oklahoma PTA.
 6. All legal records, such as agendas, minutes of meetings, financial statements, bylaws, standing rules, membership lists, financial reconciliation reports and/or professional audit reports, budget and insurance information shall be placed in clearly marked boxes and held in storage at the school until completion of the dissolution/disaffiliation process.
- b. To cease and desist from the further use of any name that implies or connotes association with National PTA or Oklahoma PTA or status as a constituent association of National PTA;
 - c. To carry out promptly, under the supervision and direction of the Oklahoma PTA, all proceedings necessary or desirable for the purpose of dissolving this local PTA.

Section 5. DISSOLUTION of a local PTA/PTSA unit: Shall dissolve its association with Oklahoma PTA (and National PTA) and finalize its affairs in the following manner:

- a. The Board of Directors of the local PTA/PTSA shall make a recommendation during a meeting of that body that the local PTA/PTSA unit be dissolved and draft a written motion of such dissolution to be voted on at a special meeting of the local PTA/PTSA unit's members.
- b. Written or printed notice stating that the purpose of such special meeting is to consider the advisability of dissolving the local PTA/PTSA unit shall be provided to each member entitled to vote at the meeting at least thirty (30) days prior to date of that meeting.
- c. A written notice of the proposed dissolution, and a copy of the proposed motion, accompanied by a copy of the notice of the special meeting given to the local PTA/PTSA unit members, shall be mailed to the President of Oklahoma PTA (via registered mail to the State office) at least thirty (30) days before the date of the special meeting of the local PTA/PTSA unit members.
- d. Only those persons who were members in good standing of the local PTA/PTSA unit at the time of the meeting of the adoption of the proposed motion and who continue to be members in good standing on the date of the special meeting shall be entitled to vote on the question of dissolution.
- e. Approval of dissolution of the local PTA/PTSA unit shall require the affirmative vote of at least two-thirds (2/3) of the local PTA/PTSA unit members present and entitled to vote at the special meeting, a quorum being present.
- f. Oklahoma PTA will be included on agenda of dissolution meeting to speak about PTA and the benefits.
- g. Upon the dissolution of local unit, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to another local PTA/PTSA, local PTA Council and or Oklahoma PTA.
- h. Send to Oklahoma PTA within 30 days of dissolution date:
 - a. Copy of all bank statements (with check copies) for the 6 months preceding the dissolution date (including the month of the dissolution)
 - b. Copy of the official meeting minutes of dissolution
 - c. Copy of FRR
 - d. Copy of final tax return

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- i. Immediately cease and desist from the further use of any name that implies or connotes association with National PTA or Oklahoma PTA or status as a constituent association of National PTA.

Section 6. No person shall speak in the name of Oklahoma PTA before official legislative bodies except the Oklahoma PTA president and/or other persons designated by the Oklahoma PTA executive committee or the president.

ARTICLE V: MEMBERSHIP AND DUES

Section 1. Every individual who is a member of this PTA is, by virtue of that fact, a member of National PTA and of Oklahoma PTA and is entitled to all the benefits of such membership.

Section 2. Membership in this PTA shall be open, without discrimination, to anyone who believes in and supports the mission and purposes of National PTA.

Section 3. This PTA shall conduct an annual enrollment of members but may admit individuals to membership at any time.

Section 4. Each member of this PTA shall pay annual unit dues as specified in this association's standing rules. The amount of such annual dues shall include the portion payable to Oklahoma PTA and the portion payable to National PTA.

Section 5. The national portion of each member's dues shall be two dollars and twenty-five cents (\$2.25) per annum.

Section 6. The Oklahoma portion of each member's dues shall be two dollars and twenty-five cents (\$2.25) per annum.

Section 7. The state and national portions of the dues paid by each member of this PTA shall be set aside by the local PTA and remitted through such channels and at such times as directed by Oklahoma PTA and National PTA.

Section 8. Only members of this PTA shall be eligible to participate in the business meetings, to vote, or to serve in any of its elective or appointive positions.

Section 9. Conflict of Interest: A PTA member shall not serve as a voting member of this PTA's board while serving as a paid employee of or under contract to this PTA.

ARTICLE VI: OFFICERS AND THEIR ELECTION

Section 1. Each officer shall be a member of this PTA.

Section 2. There shall be at least four (4) elected officers: President, Vice President, Secretary, and Treasurer. Other officers may be elected as designated in the standing rules.

Section 3. Officers shall be elected at a general membership meeting designated in the standing rules. When there is but one candidate for an office the ballot for that office may be dispensed with and election held by voice vote. A majority vote shall be required for election.

Section 4. Officers shall assume their official duties on the date designated in the standing rules and shall serve for a term designated in the standing rules, or until their successors are elected.

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Section 5. A person shall not be eligible to serve more than two consecutive terms in the same office.

Section 6. A person who has served in an office for more than one half of a full term shall be deemed to have served a full term in such office.

Section 7. Nominating Committee:

- a. There shall be a nominating committee of an uneven number of members (no less than three) who shall be elected by this PTA at a regular meeting at least thirty (30) days prior to the election of officers. The committee shall elect its own chair. The President does NOT serve as a member of this committee.
- b. The nominating committee shall nominate one eligible person for each office to be filled and report its nominees at the general membership meeting designated for elections in the standing rules. Additional nominations may be made from the floor at that time.
- c. Only those members who have signified their consent to serve if elected shall be nominated for, or elected to, such office.

Section 8. Vacancies:

- a. If a vacancy occurs in the office of President, the Vice President shall serve notice of the election within 30 days to fill the vacancy for the remainder of the current term. The nominating committee shall present the nominee to the general membership for election. The remaining officers shall serve as the nominating committee.
- b. A vacancy occurring in the office of Vice President(s), Secretary, Treasurer or other elected officers shall be filled for the unexpired term by a person elected by a majority vote of the Board of Directors.
- c. A vacancy in the office with check signatory privileges requires a financial reconciliation report to be performed immediately.

Section 9. This PTA shall submit to the Oklahoma PTA Office and any affiliated PTA council a list of newly elected officers within fourteen (14) days after their election. Changes in officers and their addresses must be reported to the Oklahoma PTA office immediately.

ARTICLE VII: DUTIES OF OFFICERS

Section 1. The President shall:

- a. Preside at all meetings of this PTA;
- b. Perform such other duties as may be prescribed in the standing rules or assigned by the PTA;
- c. Be a member ex officio of all committees except the nominating committee;
- d. Coordinate the work of the officers and committees of the PTA in order that the purposes may be promoted.
- e. Shall approve all expenditures prior to disbursements

Section 2. The Vice President shall:

- a. Act as an aide to the President;
- b. Perform the duties of the President in the absence or inability of that officer to serve;
- c. Perform such other duties as may be prescribed in the standing rules or assigned by the PTA.

Section 3. The Secretary shall:

- a. Record the minutes of all meetings of this PTA and distribute as directed by the President

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- b. Be prepared to read the records of any previous meetings;
- c. File all records;
- d. Maintain a current copy of the Uniform Bylaws and the standing rules for this PTA unit;
- e. Maintain an accurate membership list;
- f. Perform such other duties as may be prescribed in the standing rules or assigned by the PTA.
- g. Send out notification of all meetings, to include time, date and location, as prescribed by the President

Section 4. The Treasurer shall:

- a. Keep a full and accurate account of receipts and expenditures;
- b. Make disbursements as authorized by the President, Board of Directors, or this PTA in accordance with the budget adopted by this PTA;
- c. Chair the budget committee; the budget committee members shall be appointed by the board of directors.
- d. Have checks or vouchers signed by two persons, the Treasurer and one other officer (as designated in the standing rules);
- e. Present a written financial statement at every meeting of this PTA and at other times when requested by the Board of Directors;
- f. Be responsible for maintaining a record of membership dues;
- g. Be responsible for the maintenance of such books of account and records as conform to the requirements of Article IV, Section 4, of these bylaws;
- h. Submit the books annually for a financial reconciliation report or professional audit. The Board of Directors shall select a licensed accountant or CPA or financial reconciliation report committee at least two (2) weeks before the officers assume duties;
- i. Shall file appropriate 990-N; 990-EZ, or 990 Federal Tax Return on an annual basis at fiscal year-end;
- j. Perform such other duties as may be prescribed in the standing rules or assigned by the PTA.
- k. Be custodian of unit checkbook

Section 5. The elected officers of this PTA shall select the chairs of the standing committees.

Section 6. All officers upon the expiration of term of office or in case of resignation shall turn over to the President, within thirty (30) days or before new officers assume duties, all records, books, and other materials pertaining to the office, and shall return to the Treasurer, within the same time period, all funds pertaining to the office.

ARTICLE VIII: BOARD OF DIRECTORS

Section 1. The Board of Directors shall manage the affairs of this PTA in the intervals between unit PTA meetings.

Section 2. Each board member shall be a member of this PTA.

Section 3. A Board of Directors shall consist of the elected officers; the chairs of the standing committees; and the principal of the school or his representative. Other members may be designated in the standing rules. .

Section 4. The President may appoint a Parliamentarian. The Parliamentarian does not have to be a member of the PTA unit and will have no vote.

Section 5. The Board of Directors shall:

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- a. Carry out such business as may be referred to it by the membership of this local PTA;
- b. Create special committees;
- c. Approve the plans of work of the standing committees;
- d. Present a report at the regular meetings of this PTA;
- e. Select a licensed accountant or CPA or financial reconciliation report committee of three (3) members to examine the books at the end of the fiscal year and at such times as required by the resignation of the Treasurer;
- f. Prepare and submit to this PTA for adoption a budget for the year;
- g. Approve routine bills within the limits of the budget;

Section 6. Board of Directors

- a. Regular meetings of the Board of Directors shall be held during the year, the time to be fixed by the board at its first meeting of the year.
- b. Special meetings may be called by the President or upon the request of a majority of the members of the board. The number of days' notice for a special meeting shall be designated in the standing rules.

Section 7. A quorum of the Board of Directors, for the transaction of business, shall be determined in the standing rules.

Section 8. Removal from Board of Directors

- a. If any member of the Board of Directors shall at any time cease to meet the qualifications or fulfill the duties of the position, that person may be removed from the board by a two-thirds (2/3) majority vote of the entire Board of Directors.
- b. If any member of the Board of Directors shall at any time cease to meet the qualifications of their school district to be a volunteer in their school district, that person shall be immediately removed from office.

Section 9. Upon the expiration of the term of office or when individuals cease to hold the position that entitles them to be a member of the board, they shall automatically cease to be a member of the board and shall be relieved of all duties and responsibilities incident to such membership. All records, books and other materials pertaining to the position shall be turned over to the President within thirty (30) days.

Section 10. When the Board of Directors authorizes a vote by electronic mail. The vote must adhere to the laws that govern non-profit organizations in Oklahoma. The results of the vote will be placed in the minutes of the next meeting.

ARTICLE IX: COMMITTEES

Section 1. Only members of this PTA shall be eligible to serve in any elective or appointive positions.

Section 2. The standing committees of this PTA unit shall be prescribed in the standing rules.

Section 3. The term of each chair shall be the number of year(s) as designated in the standing rules or until the selection of a successor.

Section 4. The chairman of each standing committee shall present a plan of work to the Board of Directors for approval. No committee work shall be undertaken without the approval of the Board of Directors.

Section 5. Special Committees:

- a. The Board of Directors may create such special committees as it may deem necessary to promote the purposes of PTA and carry on the work of this PTA unit.

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- b. As a special committee is created and appointed for a specific purpose, it automatically goes out of existence when its work is done and its final report is received.

Section 6. The President shall be a member ex-officio of all committees except the nominating committee.

ARTICLE X: GENERAL MEMBERSHIP MEETINGS

Section 1. The months, and number of regular general membership meetings of this PTA will be specified in the standing rules. The standing rules will be read and approved at the first general membership meeting of each school year and may be read by request at any meeting or shall be available for reading.

Section 2. Special meetings of this PTA may be called by the President or at the request of a majority of the Board of Directors, or a majority of the membership. The number of days' notice shall be prescribed by the standing rules.

Section 3. The privilege of introducing motions and voting in this PTA shall be limited to current members of this PTA.

Section 4. A quorum for the transaction of business shall be specified in the standing rules.

Section 5. There shall be no proxy voting.

ARTICLE XI: COUNCIL MEMBERSHIP

(APPLIES ONLY TO LOCAL PTAs HOLDING MEMBERSHIP IN A COUNCIL OF PTAs)

Section 1. This PTA shall be represented in meetings of the *INSERT COUNCIL NAME HERE* Council of Parent Teacher Associations by delegates as specified in the Council standing rules. All representatives to a council must be members in good standing of a local PTA unit.

Section 2. Delegates and their alternates shall be elected or appointed as specified in the local unit standing rules.

Section 3. Local PTAs who are members of a Council shall pay annual dues to that Council in the amount specified and by the date specified in the Council standing rules.

ARTICLE XII: OKLAHOMA PTA CONVENTION

Section 1. Each local PTA, operating under a currently approved charter, whose membership dues have been remitted to Oklahoma PTA as required by the Oklahoma PTA bylaws, shall be entitled to representation at the annual convention by the following delegates:

- a. The President, or alternate, of the local PTA;
- b. One elected delegate or alternate for every twenty-five (25) members or major fraction thereof, in good standing, as shown on the books of the Oklahoma treasurer on March 31 of each year.

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Section 2. Delegates and their alternates shall be chosen according to the standing rules of this PTA.

Section 3. A voting delegate or a person authorized by the local PTA shall, in person, present current membership cards and credentials for those having been pre-registered and/or those being registered at the convention site.

Section 4. All Oklahoma PTA members are eligible to attend State and National convention, once appropriate fees are paid.

ARTICLE XIII: FISCAL YEAR

The fiscal year of this PTA shall be July 1 to June 30.

ARTICLE XIV: PARLIAMENTARY AUTHORITY

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

ARTICLE XV: AMENDMENTS

Amendments to the Unit Uniform Bylaws can be made only by the Oklahoma PTA Board of Directors.

Adopted 04/25/2009
Amended 07/14/2011
Amended 04/12/2014
Amended 06/09/2016