

Annual Bylaws Review Checklist

Please use this list during your ANNUAL bylaws review to make sure that your bylaws are reflecting how your Unit is conducting business, and that your Unit is in compliance with your written bylaws.

The President appoints a Bylaws Review Committee ANNUALLY to review key bylaws items. The committee is ratified by the Executive Board. The president is an ex-officio member of the committee, as with all committees.

Use the set of Unit Bylaws provided by the CUC Parliamentarian with the 2019 watermark on the first page. This template reflects major changes from all previous bylaws templates.

Key places to Review:

- ☐ Page 3, Article IV, Section 4 -- Is the dues amount correct? *If your unit has tiered dues (different amounts for teachers or students), those amounts should be handwritten on this page.*
- ☐ Page 4, Article V, Section 2 -- Is this list of officers correct? *Strongly review the number of Vice Presidents and the different secretaries. This can help with quorum issues.*
- ☐ Page 4, Article V, Section 3 & 4 -- Rules on the members and composition of the Nominating Committee. (refer to Toolkit online <http://toolkit.capta.org/?s=nominating+committee>)
- ☐ Page 5, Article V, Section 8 -- Term limits and no holding more than one office
- ☐ Page 7, Article VII, Section 2 -- When your election meeting is held
- ☐ Page 8, Article VII, Section 5 -- Quorum for Association meetings
- ☐ Page 9, Article VIII, Section 2 -- Duties of Executive Board
- ☐ Page 10, Article VIII, Section 6 -- Quorum for Executive Board meetings
- ☐ Page 10, Article VIII, Section 7 -- Express rule stating that all votes must be given in person.

Standing Rules are the roadmap for how your unit conducts business. As stated on page 16, *“Standing Rules may be adopted by a majority vote of the members present at any Association meeting.”* Please inform the Council Parliamentarian of any Standing Rules changes annually.

Key Standing Rules to Review:

- ☐ Number 5 -- List of Vice Presidents and their succession order. *Strongly review the number of Vice Presidents as it affects quorum. In the event of an absence or vacancy, the order matters.*
- ☐ Number 6 -- Check Signers, treasurer, president and two others. *All checks require two signatures, and any two signers cannot be related by blood or marriage.*
- ☐ Number 7 -- When General Association meetings are held.
- ☐ Number 8 -- Advanced notice of agenda items for a General Association meeting.

- ☐ Number 9 -- Items not published with prior notice brought up at Association meeting referred back to committee or executive board.
- ☐ Number 11 -- Day of the month Executive Board meetings are to held. *This can change yearly, and should be reflected in document. Executive Board meetings **must be held two weeks prior to General Association meetings, in the months in which General meetings are held.***
- ☐ Number 12 -- Advanced notice of agenda items for an Executive Board meeting.
- ☐ Number 13 -- Amount of funds available for UNBUDGETED expenses between association meetings. *No more than this amount can be spent **in total** without approval by the Association.*
- ☐ Number 17 -- Standing Committees needed by your unit. *Standing Committee Chairs are full, voting members of the Executive Board, and **count towards a quorum.** Strongly consider the need for any listed committees.*

After the bylaws committee reviews the Unit bylaws, the parliamentarian provides a report to the Executive Board.

Any changes must be approved by the Executive Board, and then sent to the Council Parliamentarian for review. A bylaws review report with instructions can be found on the CUC website, or the CAPTA website. This report and all paperwork must be turned into the Council Parliamentarian, who will send the proposed changes for review to both the Ninth District Parliamentarian, and the State PTA Parliamentarian.

REVIEW BY THE COUNCIL, DISTRICT AND STATE CAN TAKE UP TO TWO MONTHS.

ONLY AFTER THE BYLAWS CHANGES ARE REVIEWED AND APPROVED BY THE DISTRICT AND STATE CAN THE BYLAWS BE ADOPTED BY THE GENERAL ASSOCIATION. NO CHANGES BECOME OFFICIAL (AND NO VOTING RIGHTS ARE CONFERRED) UNTIL APPROVED AND ADOPTED BY YOUR ASSOCIATION.

We have reviewed the Bylaws for _____ (Unit name) on _____ (date). We understand that compliance with the Unit Bylaws is the responsibility of every Executive Board member.

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_____	_____
_____	_____