

**Seven steps to  
Chartering a PTA**

**A Six to Eight Week  
Process**

**Ninth District PTA, Inc.**

## **Seven Steps to Chartering a PTA**

### **A six to eight week process**

- 1 - Contact is made with either Ninth District PTA or the local PTA council - if in council. The Ninth District PTA telephone number is 858-268-8077. Council information can be obtained through the Ninth District PTA office.
2. The approval of site administrator is required to organize the new PTA. A minimum of fifteen charter members is also required. Three of these members must agree to serve as the president, the secretary and the treasurer. However, it takes more than these three officers to have a well functioning PTA.
3. An information meeting is held with the entire school community invited and shall include representatives from the PTA district and council. One person in attendance should be appointed to take minutes of all organization meetings; including the charter meeting. Those present at the information meeting vote whether or not to proceed with the formation of a PTA at the site. If the vote is to form a PTA, a planning committee chairman is elected or appointed. The planning committee chairman and secretary serve until the conclusion of the chartering meeting. The planning committee chairman is the contact person from the school with the PTA district and council officers who are assigned to assist with the formation of the PTA. Two committees are organized also:
  - Bylaws Committee has 3 - 5 members and will meet with either council or Ninth District PTA representatives to help review the model bylaws and make decisions about the PTA to be formed. Some of the decisions to be made include:
    - Amount of dues for membership;
    - Elected officers needed;
    - Months for association meetings; including the annual election meeting;
    - When officers and chairman begin the term of office;
    - Number of members to be elected to the nominating committee. More than one meeting may be required.
  - Nominating Committee has 3 - 5 members and will also meet with representatives from either the council or Ninth District PTA. Their task is to recommend a slate of officers for the new PTA as outlined in the proposed bylaws, This committee will meet after the bylaws committee has decided which officers are needed. More than one meeting may be required.
4. The meeting to charter the new PTA is a special event. Organizers should plan on the event taking an one hour. The agenda will include a vote to become a PTA; a review of and a vote to adopt the proposed bylaws; a membership campaign kickoff, and the election of officers as outlined in the adopted bylaws. The meeting may include the installation of officers and other additional business.
5. The newly elected officers meet with the Ninth District PTA representative to complete necessary paperwork and receive materials provided by the council, district, California State PTA and National PTA.
6. Arrangements are made with the PTA district or council representatives to conduct training for the new officers.
7. The PTA district will provide a new gavel and the council will provide a PTA president's pin.

NOMINATING PROCEDURES-STEERING COMMITTEE

The PTA district should duplicate copies of these instructions for use by the nominating committee.

Nominating Committee [three (3) to five (5 ) persons]

- 1 . A committee chairman should be elected, and copies distributed of the pamphlet ' Where Leadership Begins, The Nominating Committee brochure. Committee members should review the pamphlet together.
2. A PTA district or council (if in council) representative should meet with this committee to provide information regarding the role of the committee and duties of the officers to be nominated.
3. The principal (or a representative) or an authorized site administrator, if not a voting member of the nominating committee, shall serve in an advisory capacity.
4. The chairman should obtain, from the chairman of the bylaws committee, a list of the offices to be filled.
5. Each committee member must be notified of all committee meetings and every effort should be made to hold meetings at a time when all members can attend. However, the committee may function with a majority present.
6. The committee submits the names of nominees for all offices except those specified in the bylaws as appointive. Legally, only one person can be elected to Appointive offices are filled by the president, subject to ratification by the new executive board.
7. All matters considered by the nominating committee must be kept strictly confidential in order that the committee may discuss freely and objectively the qualifications of those being considered for office.
8. The nominating committee continues to function until the election takes place. if a nominee withdraws his/her name prior to the election, the committee is responsible for a replacement. Following the election, it becomes the responsibility of the executive board-elect to fill any vacancy, unless the bylaws provide otherwise.
9. The list of nominees should be kept confidential- until formally announced.
10. The chairman and committee members sign the report of the nominating committee.
11. At the organization meeting, the chairman reads the report and then presents it to the presiding chairman. A copy of the nominating report must be given to the temporary secretary to be included in the minutes.
12. No action is taken on the report. After the list of nominees is read once again by the presiding chairman, nominations from the floor are in order. (See ELECTION PROCEDURES, Sample Section.)

## BYLAWS PROCEDURES-STEERING COMMITTEE

Bylaws Committee [three (3) to five (5) persons]

The PTA district parliamentarian (or council parliamentarian, if so delegated) should call the first meeting and continue to meet with the committee in an advisory capacity.

The principal (or a representative) or authorized site administrator should be a member of this committee.

This committee should:

1. Elect a chairman.
2. Use the Bylaws for Local PTAs or PTSAs, filling in the proper blanks and writing in necessary changes or additions. Deletions may be made only in non-starred items.
3. Provide a list of proposed offices for the association to the chairman of the nominating committee, if there is one, so that nominees for office can be selected.
4. Present the proposed bylaws for adoption at the organization meeting.

Whenever possible, copies of the proposed bylaws should be available for those in attendance. The presiding chairman should explain that all starred articles and sections are part of National and California State PITA bylaws and must be adopted without change. They are automatically the same for all units and are, therefore, not open to amendments. In the case of a other articles, the presiding chairman goes through the bylaws and asks, "Is there any amendment to a particular article?" If one is offered, the amendment is discussed and voted upon immediately. After all amendments have been acted on, the unit bylaws are adopted, by one final vote, as the official bylaws of the new association. Adoption requires a majority vote.

5. After the bylaws have been adopted, six (6) or more identical copies should be prepared in ink or typed. The Bylaws for Local PTAs or PTSAs must be used. Following the organization meeting, the PTA district organizer takes five (5) copies of the bylaws leaving the unit one (1) completed copy. Five (5) copies are then given to the PTA district parliamentarian who will check them and forward one copy and four (4) back pages to the California State PITA parliamentarian for approval.

When the bylaws are approved and signed by the California State PTA parliamentarian, they are returned through the PTA district to the council (if in council) to the unit. One copy is placed in the unit recording secretary's book.

The PTA district and council (if in council) should each retain one copy of the new unit's bylaws in a permanent file for reference.

**PUBLICITY/HOSPITALITY PROCEDURES  
STEERING COMMITTEE**

The PTA district should duplicate copies of these instructions for use by the steering committee.

**Publicity**

The publicity committee is primarily responsible for the preparation, duplication and distribution of the organization meeting notice.

The meeting notice should be sent to every parent and to all school personnel. The notice should include:

1. The purpose, date, time and place of the organization meeting.
2. A reminder that charter members will be enrolled. Charter members are those who are present and pay their dues or whose dues are paid by others at the organization meeting. Charter memberships should be held open until the close of the organization meeting. Memberships may be accepted at any time throughout the year, but only those persons enrolling at the organization meeting are considered to be charter members.
3. A reminder that the proposed bylaws will be submitted for approval and officers will be elected. (If a slate of officers is available, it may be included in the notice.)
4. The signature of the principal or authorized site administrator and the chairman of the steering committee.

The local press, radio and TV should be made aware of the organization meeting. Individuals may be contacted personally. Every effort should be made to encourage attendance. (See SAMPLE NOTICE OF ORGANIZATION MEETING, Sample Section.)

**Hospitality**

Someone who has the ability to make people feel welcome should, with assistance, be responsible for:

1. Making the arrangements for the meeting place and any equipment that will be needed: an American Flag, a microphone, a lectern, a chalkboard, etc.
2. Checking with the principal or authorized site administrator regarding suitable arrangements for serving simple refreshments.
3. Arranging for several "greeters" to welcome people as they arrive.
4. Furnishing name tags to help people become acquainted.

