

# LOCAL UNIT BYLAWS

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## Jefferson Middle School PTA

Allegheny County      Region 3

### # ARTICLE I: NAME

The name of this association is the **Jefferson Middle School** Parent-Teacher Association (PTA) located in **Mt. Lebanon**, Pennsylvania.

It is a local PTA organized under the authority of the Pennsylvania Congress of Parents and Teachers, Inc. (the Pennsylvania PTA), a branch of the National Congress of Parents and Teachers (the National PTA).

### # ARTICLE II: PURPOSES

Section 1.      The Purposes of the **Jefferson Middle School PTA**, in common with those of the National PTA and the Pennsylvania PTA are

- a.      To promote the welfare of children and youth in home, school, community, and place of worship,
- b.      To raise the standards of home life,
- c.      To secure adequate laws for the care and protection of children and youth,
- d.      To bring into closer relation the home and the school, so that parents and teachers may cooperate intelligently in the education of children and youth, and
- e.      To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

Section 2.      The Purposes of the National PTA, the Pennsylvania 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 "Internal Revenue Code").

## **# ARTICLE III: BASIC POLICIES**

The following are basic policies of the **Jefferson Middle School PTA**, in common with those of the National PTA and the Pennsylvania 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 distributable 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 II hereof.
- e. Notwithstanding any other provision of these articles, the association shall not carry on any other activities not permitted to be carried on (i) by an association exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an association, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.
- f. Upon the dissolution of the association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or associations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with National PTA.
- g. 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 & PENNSYLVANIA PTA**

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

Section 2. Pennsylvania PTA provides services only to local PTAs that are in good standing. To participate in the Reflections Program at the state level and receive state mailings, local units must be in good standing.

Section 3. A local PTA in good standing is one that:

- a. adheres to the Purposes and basic policies of the PTA;
- b. has bylaws approved according to the procedures of the Pennsylvania PTA;

- c. remits the National portion of the dues through the Pennsylvania PTA office to reach the National Office by dates designated by the National PTA;
- d. submits dues to the state PTA office postmarked no later than December 1;
- e. submits officers form to the state office immediately upon election of officers and no later than June 15 annually;
- f. forwards to the state office each year upon completion a copy of their Form 990N, 990, or 990EZ as required per IRS regulations;
- g. forwards a signed copy of all audit reports to the state office immediately following their adoption by the general membership; and
- h. meets other criteria as may be prescribed by the Pennsylvania PTA.

## **# ARTICLE V: BYLAWS**

Section 1. The articles of organization of this local PTA include (a) the bylaws of such association and (b) the certificate of incorporation or articles of incorporation of such association (in cases in which the association is a corporation) or the articles of association by whatever name (in cases in which the association exists as an unincorporated association).

Section 2. This PTA shall adopt such bylaws for the government of the association as may be approved by the Pennsylvania PTA. Such bylaws shall not be in conflict with the National PTA bylaws or the bylaws of Pennsylvania PTA.

Section 3. The adoption of an amendment to any provision of the National PTA or the Pennsylvania PTA bylaws shall apply automatically and without the requirement of further action by this local PTA to amend its corresponding bylaws. Notwithstanding the automatic character of the amending process, this local PTA shall promptly incorporate such amendments in its bylaws.

Section 4. This local PTA shall include in its bylaws provisions corresponding to the provisions of National PTA and Pennsylvania PTA bylaws identified by the number (#) symbol.

Section 5. Local Unit bylaws shall be updated every five (5) years on the most current model available from the Pennsylvania PTA as provided by the Pennsylvania PTA state board of managers.

## **# ARTICLE VI: VOTING**

Section 1. Only members of this local PTA who have paid dues for the current membership year may vote on the business of this local PTA.

Section 2. Current membership must be verified for voting privileges.

Section 3. The bylaws of this local PTA shall prohibit voting by proxy.

## ARTICLE VII: MEMBERSHIP & DUES

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

#Section 2. Membership in this local PTA shall be made available without regard to race, color, creed, or national origin, under such rules and regulations, not in conflict with the provisions of the National PTA bylaws or the Pennsylvania PTA bylaws as may be prescribed in the bylaws of this local PTA, to any individual who subscribes to the Purposes and basic policies of the National PTA.

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

#Section 4. Each member of this local PTA shall pay such annual dues to said association as may be prescribed by the association. The amount of such dues shall include the portion payable to the Pennsylvania PTA -the "state portion"- and the portion payable to the National PTA -the "national portion."

#Section 5. The national portion of each member's dues, to be determined by the National PTA, shall be two dollars and twenty-five cents (\$2.25) per annum.

#Section 6. The state portion of each member's dues, to be determined by the Pennsylvania PTA, shall be two dollars and seventy five cents (\$2.75) per annum.

Section 7. The local portion of each members' dues shall be determined by this local PTA at their general membership annual meeting **held in May.**

#Section 8. Local PTA Membership:

- a. Upon payment of dues, a person of Full Age shall become a member of a local PTA unit and shall be entitled to all privileges of membership, including holding office and voting.
- b. Upon payment of dues, a person of less than Full Age (example: student in a PTA) shall become a member of a local PTA unit and shall be entitled to all privileges of membership including voting, holding chairmanships and offices, with the exception of President, First Vice-President, Secretary and Treasurer.
- c. Full Age: Of the age of eighteen years or over, as set forth by the Pennsylvania Consolidated Statutes, Title 15, Corporations and Unincorporated Associations, under which the Pennsylvania Congress of Parents and Teachers, Inc. is governed along with the Pennsylvania PTA bylaws.

# Section 9. Honorary Recognitions

- a. Honorary National Life Memberships may be conferred for distinguished service for which a fee shall be paid to the National PTA to become part of the Endowment Fund. Honorary Life Membership provides only national convention guest privileges upon payment of the convention registration fee.
- b. Honorary State Life Memberships may be conferred for distinguished service for which a fee shall be paid to the Pennsylvania PTA. The fee shall be deposited in the Hannah Kent Schoff Fund. Honorary State Life Membership provides only state convention guest privileges upon payment of the annual convention registration fee. An Honorary State Life Member may become an active member upon payment of dues in a local PTA.

- c. Child Advocacy Awards may be conferred for additional recognition of distinguished service for Pennsylvania PTA Honorary Life Members, for which a fee shall be paid to the Pennsylvania PTA. The fee shall be deposited in the Hannah Kent Schoff Fund.

# Section 10. Dues

- a. The treasurer of this PTA shall
  - 1. Send the completed membership form and five dollars (\$5.00) for the National and state portions of the dues of each member of this PTA to the state PTA office.
  - 2. Return all current unused membership cards (postmarked by July 1) to the state PTA office or be charged annual dues for each card not returned.
- b. The treasurer of this PTA shall keep records of national and state portions of the membership dues separate from record of general fund of the local PTA.
- c. The state PTA office shall notify each local unit treasurer or president thirty (30) days in advance of December 1 that national and state dues are to be postmarked by December 1.
- d. Local units that do not submit at least a portion of their dues to the state PTA office postmarked by December 1 shall be removed from the unit list and will have their non-profit status revoked.

## **ARTICLE VIII: OFFICERS**

Section 1. The officers of this local PTA shall consist of:

- #a. one (1) president;
- b. **three (3)** vice presidents;
- c. **two(2)** secretary(ies);
- #d. one (1) treasurer; and
- e. **one (1) historian**

Section 2. Officers shall be elected in the month of **March.**

#Section 3. The vote shall be conducted by written ballot unless there is only one candidate for office, at which time a voice vote may be held. A majority vote shall be required for election.

Section 4. The following provisions shall govern the qualifications and eligibility of individuals to be officers of the **Jefferson Middle School PTA.**

- #a. Each officer shall be a member of this local PTA.
- #b. 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.
- #c. No person may serve in more than one elected position in this PTA simultaneously.
- d. Each officer of this PTA shall have been a member of this PTA **or another PTA/PTSA in the**

Mt. Lebanon School District for **one (1)** month.

- e. No officer may be eligible to serve more than **two (2)** consecutive terms in the same office.
- f. To be eligible for the presidency a person must have served on the executive board of this local unit **or another PTA/PTSA in the Mt. Lebanon School District** for **one (1)** year.

Section 5. Officers shall assume their official duties **following the Mt. Lebanon City Council Luncheon held in May** and shall serve for a term of **one (1)** year, or until their successors are elected.

Section 6. A vacancy occurring in the office of president shall be filled for the remainder of the unexpired term by the **first** vice-president. A vacancy in any office other than the president shall be filled by a member elected by the executive board.

Section 7. A nominating committee composed of **three (3)** members shall be elected by this local PTA at a regular meeting in **November**, at least 2 months prior to the election of officers as outlined in Article VIII, Section 2.

- a. The committee shall elect its own chair.
- b. The nominating committee shall nominate an eligible **person for each office** and report its nominees to the general membership in **February**. Before the election takes place, the president shall call for nominations from the floor **at the February general membership meeting**.
- #c. Only those individuals who have met the qualifications as outlined in Article VIII, Section 4 and who have signified their consent to serve if elected, shall be nominated for, or elected to, such office.

## **ARTICLE IX: DUTIES OF OFFICERS**

Section 1. The president shall

- a. preside at all meetings of this local PTA;
- b. serve as an ex officio member of all committees except the nominating committee, and the auditing committee, if authorized to sign checks;
- c. coordinate the work of the officers and committees of this local PTA in order that the Purposes may be promoted;
- # d. send contact information (name, address, phone, email if available) for the incoming officers to the state PTA office immediately upon election of officers and no later than June 15 annually;
- e. perform other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the executive board;
- f. appoint a parliamentarian as needed; and
- # g. have a current copy of this unit's bylaws available for membership review.

Section 2. The vice-president(s) shall act as aide(s) to the president; and in the designated order of first vice president, second vice president, and third vice president, perform the duties of the president in the president's absence or inability to serve.

- a. The first vice-president shall:
  1. be responsible for district calendar planning
  2. oversee the work of any committee as designated by the President.
  3. be authorized to cosign all orders on the treasury of this PTA.
  4. serve as official delegate to the Mt. Lebanon City Council of PTA.
- b. The 2<sup>nd</sup> vice-president shall:
  1. act as PTA liaison to outside fundraising organizations, oversee fundraising chairs, and assist/support fundraisers of this local unit
- c. The 3<sup>rd</sup> vice-president shall:
  1. maintain and update master student list for this local unit.

Section 3. The **Recording Secretary** shall<sup>2</sup>

- # a. record the minutes of all meetings of the **Jefferson Middle School PTA;**
- #c. present a written copy of the previous meetings records at each meeting.
- #d. have at each meeting, written records available for review by members, for at least the previous twelve (12) meetings.

Section 4. **The Corresponding Secretary shall**

- a. create and distribute the Jefferson Middle School Newsletter

Section 5. The treasurer shall

- # a. have custody of and maintain a full account of the funds of this local PTA;
- b. submit dues as directed in Article VII Membership & Dues Section 10 of these bylaws;
- c. make disbursements as authorized by the executive board, or this local PTA in accordance with the budget adopted by this local PTA;
- # d. have checks or vouchers signed by two people (the treasurer and one other person);
- # e. provide a written financial statement to the executive board at each meeting;
- # f. present an annual report of the financial condition of this association to the membership;
- # g. have the accounts examined annually by an auditor or an auditing committee of not fewer than three members, who are not authorized to sign checks. If satisfied that the treasurer's annual report is correct, they shall sign a statement to that fact at the end of the report.

The auditing committee shall be elected by the executive board at least one month before the meeting at which new officers assume duties;

- #h. upon resignation of an officer during a term, have the accounts examined by an auditor or an auditing committee following the fiscal year end auditing procedures;
- #i. report the findings of the annual audit in writing to the executive board;
- #j. all audit reports shall be presented to the general membership for adoption at the first general membership meeting held after the completion of the report;
- #k. such books of account and records shall be open to inspection, at all reasonable times, by an officer of this PTA, an authorized representative of the Pennsylvania PTA or, where directed by the committee on state and national relationships, by a duly authorized representative of the National PTA; and
- #l. if unit is incorporated, notify the Pennsylvania Department of State, Bureau of Incorporation, when there is a change of officers.
- m. forward to the state PTA office each year upon completion, a copy of the Form 990N, 990, or 990EZ as required per IRS regulations; and
- n. forward a signed copy of all audit reports to the state office immediately following their adoption by the general membership.

#### **Section 6. The Historian shall**

- a. **maintain a current copy of the bylaws, records and membership list of this local unit.**

# Section 6. All officers shall perform other duties as may be provided for in these bylaws, prescribed by the parliamentary authority, or directed by the president, or the executive board.

### **ARTICLE X: EXECUTIVE BOARD**

Section 1. The business of the **Jefferson Middle School PTA** shall be managed by the executive board in the intervals between local unit PTA general membership meetings.

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

Section 3. The members of the executive board shall be elected officers **and the Principal of the school.**

Section 4. Duties of the executive board shall be to

- a. transact business as may be referred to it by the membership of this local PTA;
- b. create special committees as needed and appoint chairmen for each special committee;
- c. approve plans of work of the committees;
- d. present a report at the regular general meeting of this local PTA;
- #e. prepare and submit an annual budget to this local PTA general



membership for adoption;

f. approve payment of routine bills within the limits of the approved budget; and

**g. appoint all standing committee chairs**

Section 5. If any member of the executive board shall at anytime cease to meet the qualifications or fulfill the duties of the position, that person may be removed from the position by resolution adopted by the executive board.

Section 6. Regular meetings of the executive board shall be held with the date and time to be fixed by the boards first meeting of the year.

Section 7. Special meetings of the executive board may be called by the president or when requested by **two (2)** members upon **three (3)** days' written notice to each member of the board.

Section 8. At all meetings of the executive board, a majority of the members of the board shall constitute a quorum for the transaction of business.

Section 9. Upon the expiration of the term of office or when individuals cease to hold the position, all records, books, and other materials pertaining to the position shall be turned over to the president and all funds pertaining to the position shall be returned to the treasurer within ten (10) days.

## **ARTICLE XI: EXECUTIVE COMMITTEE N/A**

*(This article applies only to local units that have Executive Committees. If not applicable, write N/A alongside the title and draw an "X" through this section.)*

~~Section 1. There shall be an executive committee of the \_\_\_\_\_ (PTA name), the members of which shall be:~~

~~a. all elected officers; and~~

~~(list as applicable, e.g. principal)~~

~~Section 2. Special meetings of the executive committee may be called by the president or upon written request of \_\_\_\_\_ (number) members with \_\_\_\_\_ (number) day(s) notice to each member of the executive committee.~~

~~Section 3. A majority of the executive committee shall constitute a quorum for the transaction of business.~~

~~Section 4. Duties of the executive committee shall be to:~~

~~a. transact business referred to it by the board;~~

~~b. appoint standing committee chairmen and members;~~

~~c. act in emergencies between meetings of the board;~~

~~d. make a report at each board meeting;~~

~~(list other duties of executive committee)~~

~~Section 5. The executive committee shall take no action in conflict with any action taken by the executive board.~~

## ARTICLE XII: COMMITTEES

- Section 1. Only members of this local PTA shall be eligible to serve as **chairperson**.
- Section 2. The standing committees of this local PTA shall be **listed in the standing rules**.
- Section 3. The term of office of each committee chair shall be **one (1)** year or until the selection of a successor.
- Section 4. Each committee chair shall present a plan of work to the executive board for approval. No committee work shall be undertaken without the consent of the executive board.

## ARTICLE XIII: GENERAL MEMBERSHIP MEETINGS

- # Section 1. At least three (3) general membership meetings of this association shall be held during the school year. Dates of meetings shall be determined by the executive board and announced at the first general membership meeting of the year. **Three (3)** days' notice shall be given to the membership of a change of date.
- Section 2. Special meetings of this local PTA may be called by the president or by the majority of the executive board with **three (3)** days' notice having been given.
- # Section 3. The annual meeting shall be held in **May**, at which time the budget for the upcoming year shall be presented to the membership for a vote.
- # Section 4. A quorum of **seven (7)** members is required for the transaction of business in any meeting of this local PTA.

## ARTICLE XIV: COUNCIL MEMBERSHIP

*This article applies only to local units that are a part of a council PTA. If not applicable, write N/A alongside the title and draw an "X" through this section.*

The following sections must correspond to the council PTA bylaws, and are provided as a guideline to local PTAs.

Section 1. This local PTA shall be represented in meetings of **Mt. Lebanon City Council PTA** by two delegates, the president, and the first vice president, or their alternates.

- a. All representatives to the **Mt. Lebanon City Council PTA** must be members of this local PTA.

#b. Current membership must be verified for voting privileges.

Section 2. This local PTA shall pay annual dues of **one dollar and five cents (\$1.05) to the Mt. Lebanon City Council of PTAs, as provided in the council bylaws, to be applied as follows:**

- a) **Forty-five cents (\$0.45) per member will be used for operating expenses;**
- b) **Sixty cents (\$0.60) per member will be a special fund maintained for the Georgia Pogue Scholarship Fund. The scholarship portion of the dues shall automatically increase in twenty cents (\$.20) increments biennially beginning in 2012, until such time as the scholarship portion of the dues reaches \$1.00 per member.**

## **# ARTICLE XV: PENNSYLVANIA PTA CONVENTION**

Section 1. This local PTA shall be entitled to be represented at the state convention of the Pennsylvania PTA by the president (or alternate) and one (1) accredited (or alternate) delegate for every twenty-five (25) members as shown on the record of the state treasury thirty (30) days prior to the state convention.

Section 2. All representatives to the Pennsylvania PTA convention must be members of this local PTA.

Section 3. Delegates or their alternates shall be selected in accordance with the Standing Rules of this PTA.

## **# ARTICLE XVI: FISCAL YEAR**

1. The fiscal year of the Jefferson Middle School PTA shall begin on July 1st and end on the following June 30th.

2. The fiscal year of a local PTA shall be the same as its accounting year and shall be in accordance with the information provided on the SS-4 form currently filed with the IRS.

## **# ARTICLE XVII: DISSOLUTION & WITHDRAWAL OF CHARTER**

Section 1. This local unit PTA shall be subject to withdrawal of its charter in the manner and under the circumstances provided in the Pennsylvania PTA bylaws.

Section 2. A local PTA considering dissolution must:

- a. have a Pennsylvania PTA representative to speak in favor of continuing PTA at a meeting of the executive board prior to taking action on dissolving;
- b. upon decision to recommend dissolution of the unit, present the resolution to the members at the next general meeting for their information;
- c. announce that a vote on the dissolution will be taken at the next general meeting. A two-thirds (2/3) vote is required to dissolve a local unit;
- d. require each person voting to dissolve be a member of this local PTA for at least 90 days;
- e. arrange for a Pennsylvania PTA representative to speak to the members at the general meeting at which the vote is to be taken;
- f. arrange for the proper disposal of PTA funds and property according to the provisions of these bylaws; and
- g. provide for the dissolution to take effect immediately after the dissolution is voted and not to be post-dated.

Section 3. This local PTA is obligated, upon withdrawal of its charter by the Pennsylvania PTA to:

- a. Refer to #Article III: Basic Policies, (f).
- b. cease and desist from the further use of any name that implies or connotes association with the National PTA or the Pennsylvania PTA or status as a constituent association of the National PTA; and
- c. carry out promptly, under the supervision and direction of the Pennsylvania PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA.

### **#ARTICLE XVIII: PARLIAMENTARY AUTHORITY**

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

### **# ARTICLE XIX: AMENDMENTS**

Section 1. These bylaws may be updated or amended at any general membership meeting of this association by a two-thirds vote of the members present and voting, provided that notice of the proposed amendment shall have been given at least thirty (30) days prior to the meeting at which the amendment is voted upon and that amendment shall be subject to the approval of the Pennsylvania PTA.

Section 2. Submission of amendments or updated bylaws for approval by the Pennsylvania PTA shall be in accordance with the bylaws or regulations of the Pennsylvania PTA.

Section 3. The adoption of an amendment to any provision of the National PTA and the Pennsylvania PTA bylaws shall serve automatically and without the requirement of further action by this association to amend their corresponding bylaws. Local PTAs shall promptly incorporate such amendments in their respective bylaws.

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# Required by the Pennsylvania PTA.

<sup>1</sup>There should be a corresponding section listing the duties of each vice president.

<sup>2</sup>There should be a corresponding section listing the duties of each secretary.

SIGNATURE/APPROVAL PAGE

Bylaws of the \_\_\_\_\_ PTA/PTSA

County \_\_\_\_\_ Region \_\_\_\_\_

Approved by the general membership at its meeting on \_\_\_\_\_  
Date of Approval

\_\_\_\_\_  
President's Signature President's Name – Printed

\_\_\_\_\_  
President's Home Street Address Town Zip

( )  
\_\_\_\_\_  
President's Home Telephone Number President's Email Address

\_\_\_\_\_  
Secretary's Signature Secretary's Name – Printed

**Reviewed by Council Bylaws Chairman (if applicable)**

\_\_\_\_\_  
Name of Council Date Reviewed

\_\_\_\_\_  
Council Chairman's Signature Council Chairman's Name - Printed

\*\*\*\*\*  
(Space below for use by State Bylaws & Policies Chairman only.)

Approved on behalf of the Pennsylvania PTA Board of Managers by the Bylaws & Policies Chairman.



\_\_\_\_\_  
State Chairman's Signature Date of Approval

**Marie Merkel**  
\_\_\_\_\_  
State Chairman's Name – Printed

**608 N. Rebecca Avenue** **Scranton, PA** **18504**  
\_\_\_\_\_  
Street Address Town Zip

**( 570 ) 881-8010** **mmerkel@papta.org**  
\_\_\_\_\_  
Telephone Number State Chairman's Email Address

Note: These bylaws are to be updated five (5) years from the date approved by the state bylaws & policies chairman. To update, please contact the state PTA for the most current bylaws model.

Pennsylvania Congress of Parents and Teachers, Inc.  
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