



**CALIFORNIA  
TEACHERS  
ASSOCIATION**

***REQUIREMENTS FOR  
DEVELOPMENT OF  
BYLAWS FOR  
CHARTERED  
CHAPTERS  
OF CTA***



**2023-2024**

**CTA GOVERNANCE DOCUMENTS REVIEW COMMITTEE**



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**CTA President**

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**Erika Jones, Secretary-Treasurer**  
**Joe Boyd, Executive Director**

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## GOVERNANCE DOCUMENTS REVIEW COMMITTEE

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### Function, Program and Service of the Committee

The Governance Documents Review Committee was initiated by the CTA Board of Directors.

Both CTA and NEA include as part of their chartering standards for chapters (locals) an ongoing review of the governance documents of chartered chapters (locals) at least once in every five (5) year period.

The Governance Documents Review Committee has been designated the body within CTA to conduct this review of governance documents for CTA and NEA. The Committee will review a chapter's governance documents and report back to the chapter its findings and recommendations.

### Charge to Committee (CTA Standing Rule 8-13)

**The Governance Documents Review Committee shall have the following duties and functions:**

1. **Purpose.** This Committee conducts ongoing reviews of governance documents of chartered chapters for CTA and NEA. It reports its finding to local chapters. Upon request, these reports shall be made available to the CTA Board of Directors.
2. **Other duties include:**
  - A. Review of chartering procedures, including the methods of granting and withdrawal.
  - B. Review of specific charter applications with recommendations to the Board of Directors for final action.
  - C. Review of chartering status of local CTA chapters.
  - D. Periodically to review the Rules of Operation of recognized Service Center Councils to determine their consistency with CTA policies and governance documents.
  - E. Performance of any other governance document related reviews that may be referred to the Committee by the Board of Directors.

Amended April 2022

## BEFORE YOU START, READ ME FIRST

1. **How can a chapter know if its governance documents meet current chartering standards?**

Request a review by the Governance Documents Review Committee by submitting your current governance documents. Bylaw Committee may request a review of a Chapter's documents.

2. **Why do CTA chapters have to meet NEA requirements?**

California Teachers Association is a state affiliate of the NEA and in order to meet its obligations, CTA must require its members and chapters to comply with NEA standards. Further, CTA chapters must be affiliated with the NEA as required by CTA Standing Rule 4-1.

3. **Why use *Robert's Rules of Order, Newly Revised, latest edition*, as the parliamentary authority?**

It is the most widely accepted authority on parliamentary procedures.

4. **Who is entitled to vote in chapter elections?**

The right to vote and to hold elective office or appointive position within the Association shall be limited to Active members. All Active members shall be eligible to vote in chapter elections except where the election is restricted to a specific group of Active members, i.e., such as elections for faculty representatives or At-Large Directors on the Executive Board representing geographic or level constituencies.

5. **Why is it necessary to have special elections to fill vacancies in elected offices? Why can't the President appoint someone to fill a vacancy?**

CTA/NEA rules require that only elected persons serve in elective governance positions. Therefore, when a vacancy occurs, a special election is the only way the electorate has to ensure that the office will be filled by a person representing a majority of the electorate. An appointee of the President only represents the President.

6. **Who votes on the Executive Board and/or Representative Council?**

CTA/NEA rules require that all voting members of governance bodies only be elected by the membership and/or Representative Council they represent. Therefore, appointed persons may serve on representative councils and executive boards in a non-voting status.

7. **What about State Council representatives, Service Center representatives or CTA/NEA office holders?**

You have the option of having them serve, but if they are not elected by your members, and only by your members, they cannot have a vote. For example, a State Council representative in a multiple chapter seat cannot vote unless the member was also elected to serve on the Representative Council by the school/work site.

8. **Should chapters have an immediate past president on their executive board?**

CTA recommends against having a past president. If the chapter finds it necessary, they must be non-voting and only serve for one year.

9. **Should chapters have Co-Presidents?**

No, it is not consistent with CTA/NEA affiliation standards or *Robert's Rules of Order*. If Co-Presidents exist, each has distinct roles defined in the chapter bylaws and succession in the event of vacancy is defined.

10. **Should chapters use a President-elect system?**

No. Chapters must hold a direct election for President with open nominations and secret ballot.

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

**11. How are Memoranda of Understanding (MOU) or Side Letters of Agreement ratified as compared to Successor Collective Bargaining Agreements?**

CBA's must go through a ratification vote by membership and is properly defined in the Bylaws. MOU's and Side Letters of Agreement can be ratified as expressed by the Standing Rules - either solely by the Executive Board or by the Representative Council. The Representative Council may determine, by majority vote, to send the MOU's or Side Letters to the general membership for ratification.

**12. How many Site Representatives are you supposed to have if your policy-making body is a Representative Council?**

The Bylaws require that each site shall be entitled to at least one representative and shall have one representative for a specific number of Active members, or major fraction thereof. Your Standing Rules can define the meaning behind that statement as follows:

Number of Reps	1 Rep per 10 members	1 Rep per 15 members	1 Rep per 20 members
1	1 – 15	1 – 23	1 – 30
2	16 – 25	24 – 37	31 – 50
3	26 – 35	38 – 53	51 – 70
4	36 – 45	54 – 67	71 – 90
5	46 – 55	68 - 83	91 – 110
≥ 6	Same interval	Same interval	Same interval

**13. The Bylaws require that the Executive Board is made-up of the four Officers (President, Vice-President, Secretary, and Treasurer). It also is permissive of expanding the Executive Board to include members elected at large from the Active membership, as long as this complies with the “one-person – one-vote” rule. What does that mean?**

The Executive Board can expand beyond the Officers, but you must ensure that the other positions represent an equivalent level of representation. For example, it would be acceptable to have three At-Large Directors on the Executive Board (in addition to the Officers) if each At-Large Director represents an equivalent number of members (i.e. they each represent 100 members, as an illustration). The active members who declare for an At-Large Director seat must come from the constituency group that is defined by that seat. However, like Officers, the entire Active Membership must be permitted to vote for all of the At-Large Directors. Lastly, the Bylaws must define the roles for each of these At-Large Directors, their term of office, and a vacancy clause that matches the vacancy clause of the Officers other than a vacancy created by the chapter President.

**14. This seems complicated, how can I get this done in an expedited process?**

Follow the appropriate template, which is available online or in print. Template A is for chapters using the Active members of the Association as their policy making body. Template B is for chapters using a Representative Council as their policy making body.

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

CTA Standing Rule 4-1 requires each chapter to submit a copy of its governance document(s) for review when applying for a charter, when they have amended their current document(s), or when requested to do so for the required five-year review. Chapter governance documents may include: Articles of Incorporation<sup>1</sup>, Constitution<sup>2</sup>, Bylaws, and Standing Rules.

CTA requires that chapters use a Bylaws document and adhere to the elections procedures in the *CTA Requirements for Chapter Election Procedures* as this provides the most convenient and effective forms of governance documents (*the templates below conform to CTA and NEA requirements*):

Template “A” — for chapters not using a representative body; Pages 5-10

Template “B” — for chapters using a representative body; Pages 11-17

CTA suggests that a committee be formed in the interest of making the task of drafting new or revised governance documents easier. This committee’s responsibility is to draft and proofread the documents, looking for contradictions, major omissions, or other errors. The Bylaw Committee presents the updated bylaws to the Executive Board for approval. The Executive Board then submits the updated bylaws to the Bylaw Review Committee for compliance. The reviewed bylaws are then presented to the Representative Council or General Membership for first and second reading.

1. The purpose of bylaws is to ensure the orderly operation of your association, guaranteeing a democratic process and individual rights. Bylaws are broad and general statements of the philosophy, goals, and basic foundation of the organization’s governance structure. They are not easily changed, requiring prior notice to the governing body and an affirmative vote by 2/3 of those voting.
2. Local Standing Rules that are the day-to-day rules by which the organization runs its meetings and business. However, these standing rules are not required to be submitted for review as long as these do not conflict with the Bylaws or *CTA Requirements for Chapter Election Procedures*.
3. Standing Rules can be changed in order to adapt to changing conditions and policy by a majority vote of the Executive Board.

Contact the Governance Documents Review Committee through the Governance Support Department for assistance in drafting or revising governance documents.

<sup>1</sup> If a chapter is incorporated, its Articles of Incorporation are a part of its governance documents and must be kept on file at the chapter for reference.

<sup>2</sup> If a chapter has both a Constitution and Bylaws, its Constitution must be consistent with its Bylaws and amended by the same process as its Bylaws.

**Template “A”  
For chapters using the active membership.**

**BYLAWS**

\_\_\_\_\_**ASSOCIATION/CTA/NEA**

**I. NAME AND LOCATION**

The official name of this Association shall be the \_\_\_\_\_  
Association/CTA/NEA in \_\_\_\_\_ County. *(CTA Bylaws, Article I, section 1)*

**II. PURPOSES**

The primary purposes of this Association shall be:

- A. To represent its members in their relations with their employer, and to seek to be the exclusive representative of appropriate units of school employees in all matters relating to employment conditions and employer-employee relations including, but not limited to, wages, hours, and other terms and conditions of employment;
- B. To form a representative body capable of developing group opinion on professional matters to speak with authority for members;
- C. To provide an opportunity for continuous study and action on problems of the profession to advocate and take action on all matters pertaining to public education;
- D. To promote cooperation and communication between education support professionals and certificated educators;
- E. To provide a means of representation for its ethnic-minority members;
- F. To promote professional attitudes and ethical conduct among members;
- G. To encourage cooperation and communication between the profession and the community; and
- H. To foster good fellowship among members.

*(Clauses A-H: CTA Bylaws, Article I, section 2)*

**III. AFFILIATION WITH CTA/NEA**

- A. The \_\_\_\_\_ Association shall be a chartered chapter of the California Teachers Association (CTA).
- B. The \_\_\_\_\_ Association shall be an affiliate local association of the National Education Association (NEA).

*(CTA Standing Rule 4-1, section 1-J-3)*

**IV. MEMBERSHIP**

- A. The primary category of membership shall be Active members.
- B. Active membership shall be open to any person engaged in, or who is on a limited leave of absence from, non-administrative, non-supervisory, public education employment and is an employee of \_\_\_\_\_. *(CTA Bylaws, Article III, section 3)*
- C. Membership shall be granted upon initiation of payroll deduction or upon payment of annual Association/CTA/NEA dues. *(CTA Bylaws, Article III, section 2)*
- D. The right to vote and to hold elective office or appointive position within the Association shall be limited to Active members. *(CTA Bylaws, Article III, section 5)*



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- E. Members shall receive special services, obtain assistance in the protection of professional and civil rights, and receive reports and publications of the Association. *(CTA Bylaws, Article III, section 5)*
- F. Active members shall adhere to The Code of Ethics of the Education Profession. *(CTA Bylaws, Article III, section 6)*
- G. Members shall enjoy the same rights and privileges, regardless of age, gender identity, race, ethnicity, national origin and sexual orientation. *(CTA Bylaws, Article III, section 5)*
- H. Any and all disciplinary matters shall include due process. Due process includes the right to select representation, to present evidence on their behalf, to confront and cross-examine their accuser and any other witnesses against them, and to examine and refute all evidence considered by the hearing panel, whether or not such evidence is presented at a hearing. All members have the right to appeal the decision of the hearing panel to the governing body. *(CTA Bylaws, Article III, section 5 & 7)*
- I. The membership year shall be that period of time from September 1 of any given calendar year through August 31 of the following calendar year, inclusive. *(CTA Standing Rule 5-3)*

### V. DUES AND ASSESSMENTS

- A. The basic annual dues level for Active members shall be sufficient to cover the operation expenses of the Association, the dues of CTA, and the dues of NEA. *(CTA Standing Rule 5-2)*
- B. The Association's portion of the basic annual dues, shall be established by action of the active membership of the Association at the last regular meeting of the school year. *(CTA Standing Rule 5-2)*
- C. Membership shall be continuous after initial enrollment until delinquent or until a change in professional status makes the member ineligible for membership. If by October 31 of any calendar year a member has neither paid the established annual membership dues for the current membership year, nor made satisfactory arrangements for payment, then that person's membership shall be considered delinquent and the name dropped from the rolls. *(CTA Bylaws, Article III, section 7)*

### VI. POLICY-MAKING BODY

- A. The policy-making body of this Association shall consist of the Active members of the Association through whom power is derived and decision-making is accountable. *(CTA Bylaws, Article V, section 1)*
- B. The Association shall meet a minimum of \_\_\_\_\_ times a year; the time and place of such meetings to be decided by the Executive Board. *(CTA Bylaws, Article V, section 7)*
- C. The policy-making body shall:
  - 1. Establish Association policies and objectives;
  - 2. Adopt the annual budget of the Association on or before the first meeting of the school year;
  - 3. Approve the establishment or discontinuance of *ad hoc* committees and/or task forces including the membership of those bodies as recommended by the Executive Board; and
  - 4. Establish the dues of the Association.*(Clauses 1-4: CTA Bylaws, Article V, section 1)*
- D. Special meetings of the Association shall only be called by the President, the Executive Board, or by a petition containing the signatures of twenty percent (20%) of the Active membership. *(CTA Bylaws, Article V, section 7)*
- E. Special meetings of the Association shall only be called for a specific purpose and only that business shall be considered. *(CTA Bylaws, Article V, section 7)*
- F. Notices and agendas for each meeting of the Association shall be provided to all members of the Association no less than two (2) days prior to the date of the meeting. *(CTA Bylaws, Article V, section 7)*
- G. For emergency meetings during crisis situations, the Executive Board shall adopt procedures to notify representatives of meeting dates, places, and times. *(CTA Bylaws, Article V, section 7)*

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- H. General Membership meetings that are connected electronically may be held if members may interact in the meeting. Members at all sites shall be able to be seen and heard by the entire General Membership, allowing complete participation. A roll call attendance and subsequent votes shall be conducted by the secretary. *(CTA Bylaws, Article V, section 8)*
- I. A quorum for all meetings of the Association shall consist of a majority of all Active members. *(CTA Bylaws, Article V, sections 8 & 9)*

### VII. OFFICERS

- A. The officers of the Association shall be President, Vice President, Secretary, and Treasurer. *(CTA Bylaws, Article VII, section 1)*
- B. These officers shall be members in good standing of their local, state, and national associations as a condition for nomination to and service in their respective positions during their terms of office. *(CTA Standing Rule 4-1, section 1-J-4)*
- C. These officers shall be elected by and from the Active membership of the Association. Such election shall be by open nominations and secret ballot. *(CTA Bylaws, Article VII, section 3)*
- D. Officers shall be elected for a term of \_\_\_\_\_ year(s), commencing on \_\_\_\_\_ of any calendar year. *(CTA Bylaws, Article VII, section 3)*
- E. A vacancy shall exist in the case of death, resignation, or inability to serve in any of the offices of the Association. If there is a vacancy occurring in the office of the President, the Vice-President shall assume the office. In the event a vacancy occurs in the other offices, a special election shall be held to elect successors to fill the unexpired terms. *(CTA Bylaws, Article VII, section 6)*
- F. The President shall be the chief executive officer of the Association and its policy advocate.

The President shall, subject to other provisions of these Bylaws:

1. Preside at all meetings of the Association, the Representative Council and Executive Board; *(CTA Bylaws, Article VII, section 7a and 7c)*
2. Prepare the agenda for the meetings of the Association, the Representative Council and the Executive Board; *(CTA Bylaws, Article VII, section 7d)*
3. Be the official spokesperson for the Association; *(CTA Bylaws, Article VII, section 7g)*
4. Adhere to the governance documents of the Association, CTA, and NEA; *(CTA Standing Rule 4-1, section 1-J)*
5. Appoint all chairpersons and members of all committees by the beginning of each school year; *(CTA Bylaws, Article VI, section 9-J)*
6. Appoint the chairperson and members of the Bargaining Team by the beginning of each school year; *(CTA Bylaws, Article VI, section 9-J)*
7. Call meetings of the Association, Representative Council and the Executive Board; *(CTA Bylaws, Article VII, section 7b)*
8. Propose the procedures for grievance processing for ratification by the Executive Board and the Active membership of the Association; *(CTA Policies, Grievance Processing)*
9. Suggest policies, plans and activities for the Association and be held responsible for the progress and work of the Association; *(CTA Bylaws, Article VII, section 7d)*
10. Attend meetings of the Service Center Council of which the Association is a part; *(CTA Bylaws, Article VII, section 7g)*
11. Attend other CTA/NEA meetings as directed by the Active membership; and *(CTA Bylaws, Article VII, section 7g)*
12. Order the payment of funds as necessary. *(as outlined in the CTA Treasurer's Handbook) (CTA Bylaws, Article VII, section 7)*

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

### G. The Vice-President shall:

1. Serve as assistant to the President in all duties of the President;
2. Assume the duties of the President in the absence of the President;
3. Be responsible for the formation and distribution of the Association's calendar of activities; and
4. Serve as coordinator of committee activities at the direction of the President.

*(Clauses 1-4: CTA Bylaws, Article VII, section 8)*

### H. The Secretary shall:

1. Maintain a careful and accurate record of the proceedings of each meeting, regular or special, of the Association-and the Executive Board;
2. Be responsible for the distribution of minutes, notice of meetings, and agendas for all meetings to members of the Active Membership and the Executive Board;
3. Maintain an accurate roster of the membership of the Association and of all committees; and
4. Carry on the correspondence pertaining to the affairs of the Association as directed by the President.

*(Clauses 1-4: CTA Bylaws, Article VII, section 9)*

### I. The Treasurer shall:

1. Receive all funds belonging to the Association and be responsible for their safekeeping and accounting;
2. Pay out such funds upon orders of the President; *(as outlined in the CTA Treasurer's Handbook)*
3. Provide a written financial report for each regular meeting of the Association and Executive Board;
4. Be responsible for an annual audit of the books of the Association and distribute a summary of this audit to the membership; and
5. Be responsible for submitting membership and financial reports to CTA, NEA, and other agencies as required by law.

*(Clauses 1-5: CTA Bylaws, Article VII, section 9)*

## VIII. EXECUTIVE BOARD:

- A. The Executive Board shall be composed of the elected officers, (and may include members elected at-large from the Active membership, as long as this complies with the "one-person – one-vote" rule).
- B. All members of the Executive Board shall be members in good standing of their local, state, and national associations as a condition for nomination to and service in this position.
- C. The Executive Board shall meet prior to each regular meeting of the Association and at such other times as the President may deem necessary, or upon written petition of a majority of the members of the Executive Board. *(CTA Bylaws, Article VI, section 6)*
- D. The duties and the responsibilities of the Executive Board are:
  1. Exercise all the business and organizational powers and duties for the Association as prescribed by law and these bylaws;
  2. Coordinate the activities of the Association;
  3. Adopt, amend and publicize the local Standing Rules for the Association;
  4. Recommend a budget for the Association to the Active membership;
  5. Approve by majority vote the President's appointments and removal of committee members, including chairpersons;
  6. Approve by majority vote the President's appointments and by two-thirds (2/3) vote removal of bargaining team members;

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

7. Direct the bargaining activities of the Association, subject to the policies established by the Active membership; and
8. Adopt grievance procedure and direct the grievance activities of the Association.

*(Clauses 1-8: CTA Bylaws, Article VIII, section 2)*

- E. A quorum for all meetings of the Executive Board shall consist of a majority of the elected members of that body. *(CTA Bylaws, Article VIII, section 2)*

### IX. BARGAINING TEAM

- A. The duties of the Bargaining Team are to represent and to bargain for all bargaining unit members.
- B. The President shall appoint all members, alternates, and the chairperson of the Bargaining Team with the concurrence of the Executive Board.
- C. Vacancies created by resignation or inability to serve shall be filled by the Executive Board from the list of alternates.
- D. The Executive Board, by two-thirds (2/3) vote, may remove a member of the Bargaining Team.
- E. Responsibility and authority for directing the bargaining process on behalf of the Association are vested in the Executive Board.
- F. All bargaining unit members shall be surveyed to determine contents of the proposed contract demands. The contract proposal shall be approved by the Active membership.
- G. The Bargaining Team shall report its activities to the Executive Board as the Board requires.
- H. The Executive Board shall provide for the dissemination of information regarding bargaining and the activities of the Bargaining Team to the general membership.
- I. The Bargaining Team is empowered to reach tentative agreements with the district. Such agreements shall be considered tentative and not binding upon the Association until such agreements have been ratified by the membership in the appropriate unit(s) unless such ratification has been specifically waived or otherwise delegated by that active membership.

### X. GRIEVANCE PROCESSING

- A. The Executive Board shall adopt, with the approval of the Active membership, the procedures for grievance processing. *(CTA Policies, Grievance Processing)*
- B. These procedures shall include, but not be limited to, the following:
- C. Provide for representation to assist all members of the bargaining unit(s) in processing grievances;
- D. Training for handling grievances; and
- E. Evaluation of the Association's grievance policies and procedures.

### XI. NOMINATIONS AND ELECTIONS

The Chapter shall follow and members are entitled to the rights contained in the *CTA Requirements for Chapter Election Procedures* published annually with the *CTA Elections Manual*.

The chapter president must provide all Active members an opportunity to vote. Chapter presidents do not have the option of deciding that such elections shall not be held. *(CTA Bylaws, Article VI, section 3; CTA Standing Rule 8-12)*

- A. The Elections Committee and Chairperson shall be appointed by the President and approved by the Executive Board to which it is responsible at the beginning of each school year. The duties of the Elections Committee shall be to:
  1. Ensure that all Association/CTA/NEA election codes and timelines are followed;
  2. Establish, develop and carry out election timelines and procedures;
  3. Prepare ballots for election of officers and such other elections as may be necessary;

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

4. Count the ballots and certify the results; and
  5. Process initial challenges.
- B. Elections shall be conducted with:
1. Open nomination procedure;
  2. Secret ballot;
  3. All Active member vote;
  4. Record of voters receiving or casting ballots; and
  5. Majority vote, unless otherwise specified.
- C. State Council Representative elections shall be conducted in accordance with CTA rules after the chapter or Service Center Council has been notified to do so by the CTA Elections and Credentials Committee.
- D. NEA State Delegate elections shall be conducted in accordance with CTA/NEA rules.
- E. NEA Local Delegate elections shall be conducted in accordance with CTA/NEA rules.

### XII. COMMITTEES

- A. Committees, except as otherwise provided in these bylaws, may be established and discontinued by the Executive Board, subject to approval by the Active membership. (*CTA Bylaws, Article VIII; CTA Standing Rule 7-1*)
- B. Each committee shall submit periodic reports to the Executive Board and Active membership.
- C. The Executive Board shall direct the activities of all committees, subject to the policies established by Active membership.

### XIII. PARLIAMENTARY AUTHORITY

On all matters of procedure not otherwise covered by the provisions of these Bylaws, *Robert's Rules of Order*, latest revised edition, shall be followed at all meetings of the Association, and the Executive Board. (*CTA Bylaws, Article XV*)

### XIV. AMENDMENTS

These Bylaws may be amended by a two-thirds (2/3) vote of the representatives at any regular or special meeting of the Association. Notice in writing of a proposed Bylaws amendment shall have been submitted to the Secretary (Secretary-Treasurer) and provided to all members of the Association on or before the meeting preceding the one at which it is to be voted upon. (*CTA Bylaws, Article XVI*)

**Template “B”  
For chapters using a representative body.**

## BYLAWS

\_\_\_\_\_ ASSOCIATION/CTA/NEA

### I. NAME AND LOCATION

The official name of this Association shall be the \_\_\_\_\_  
Association/CTA/NEA in \_\_\_\_\_ County. *(CTA Bylaws, Article I, section 1)*

### II. PURPOSES

The primary purposes of this Association shall be:

- A. To represent its members in their relations with their employer, and to seek to be the exclusive representative of appropriate units of school employees in all matters relating to employment conditions and employer-employee relations including, but not limited to, wages, hours, and other terms and conditions of employment;
- B. To form a representative body capable of developing group opinion on professional matters to speak with authority for members;
- C. To provide an opportunity for continuous study and action on problems of the profession to advocate and take action on all matters pertaining to public education;
- D. To promote cooperation and communication between education support professionals and certificated educators;
- E. To provide a means of representation for its ethnic-minority members;
- F. To promote professional attitudes and ethical conduct among members;
- G. To encourage cooperation and communication between the profession and the community; and
- H. To foster good fellowship among members.

*(Clauses A-H: CTA Bylaws, Article I, section 2)*

### III. AFFILIATION WITH CTA/NEA

- A. The \_\_\_\_\_ Association shall be a chartered chapter of the California Teachers Association (CTA).
- B. The \_\_\_\_\_ Association shall be an affiliate local association of the National Education Association (NEA).

*(CTA Standing Rule 4-1, section 1-J-3)*

### IV. MEMBERSHIP

- A. The primary category of membership shall be Active members.
- B. Active membership shall be open to any person engaged in, or who is on a limited leave of absence from, non-administrative, non-supervisory, public education employment and is an employee of \_\_\_\_\_. *(CTA Bylaws, Article III, section 3)*
- C. Membership shall be granted upon initiation of payroll deduction or upon payment of annual Association/CTA/NEA dues. *(CTA Bylaws, Article III, section 2)*
- D. The right to vote and to hold elective office or appointive position within the Association shall be limited to Active members. *(CTA Bylaws, Article III, section 5)*

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

- E. Members shall receive special services, obtain assistance in the protection of professional and civil rights, and receive reports and publications of the Association. *(CTA Bylaws, Article III, section 5)*

Active members shall adhere to The Code of Ethics of the Education Profession. *(CTA Bylaws, Article III, section 6)*

- F. Members shall enjoy the same rights and privileges, regardless of age, gender identity, race, ethnicity, national origin and sexual orientation. *(CTA Bylaws, Article III, section 5)*

- G. Any and all disciplinary matters shall include due process. Due process includes the right to select representation, to present evidence on their behalf, to confront and cross-examine their accuser and any other witnesses against them, and to examine and refute all evidence considered by the hearing panel, whether or not such evidence is presented at a hearing. All members have the right to appeal the decision of the hearing panel to the governing body. *(CTA Bylaws, Article III, section 5 & 7)*

- H. The membership year shall be that period of time from September 1 of any given calendar year through August 31 of the following calendar year, inclusive. *(CTA Standing Rule 5-3)*

### V. DUES AND ASSESSMENTS

- A. The basic annual dues level for Active members shall be sufficient to cover the operation expenses of the Association, the dues of CTA, and the dues of NEA. *(CTA Standing Rule 5-2)*

- B. The Association's portion of the basic annual dues, shall be established by action of the Representative Council at the last regular meeting of the school year. *(CTA Standing Rule 5-2)*

- C. Membership shall be continuous after initial enrollment until delinquent or until a change in professional status makes the member ineligible for membership. If by October 31 of any calendar year a member has neither paid the established annual membership dues for the current membership year, nor made satisfactory arrangements for payment, then that person's membership shall be considered delinquent and the name dropped from the rolls. *(CTA Bylaws, Article III, section 7)*

### VI. POLICY-MAKING BODY

- A. The policy-making body of the Association shall be a Representative Council, which is comprised of the Active members of the Association through whom power is derived and decision-making is accountable. *(CTA Bylaws, Article V, section 1)*

- B. The Representative Council shall be composed of the following Active members:

1. Voting members of the Executive Board;
2. Representatives elected on the basis of one-person one-vote;
3. Active members of a chapter shall have the right to attend and observe official meetings of the Representative Council. Business shall be conducted by duly-elected Representatives or Seated Alternates. *(CTA Bylaws, Article X, Section 4)*
4. State Council Representatives;
  - (a) Single Chapter Representative(s) – voting members
  - (b) Multiple Chapter Representative(s) – ex-officio, non-voting member unless otherwise elected to the Representative Council *(CTA Bylaws, Article V, sections 2-4)*

- C. The Representative Council shall:

1. Establish Association policies and objectives;
2. Adopt the annual budget of the Association on or before the first meeting of the school year;
3. Approve the establishment or discontinuance of ad hoc committees and/or task forces including the membership of those bodies as recommended by the Executive Board; and
4. Establish the dues of the Association.

*(Clauses 1-4: CTA Bylaws, Article V, section 1)*

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

- D. The Representative Council shall schedule meetings monthly during the school year. The place and time of meetings shall be decided by the Executive Board. *(CTA Bylaws, Article V, section 7)*
- E. Special meetings of the Representative Council may be called by the President, the Executive Board, or by the petition of twenty percent (20%) of the Active membership. *(CTA Bylaws, Article V, section 7)*
- F. Special meetings of the Representative Council shall only be called for a specific purpose and only that business shall be considered. *(CTA Bylaws, Article V, section 7)*
- G. Notices and agendas for each meeting of the Representative Council shall be provided to all members of the Representative Council no less than two (2) days prior to the date of the meeting. *(CTA Bylaws, Article V, section 7)*
- H. For emergency meetings of the Representative Council during crisis situations, the Executive Board shall adopt procedures to notify representatives of meeting dates, places, and times. *(CTA Bylaws, Article V, section 7)*
- I. Representative Council meetings that are connected electronically may be held if members may interact in the meeting. Members at all sites shall be able to be seen and heard by the entire Representative Council, allowing complete participation. A roll call attendance and subsequent votes shall be conducted by the secretary. *(CTA Bylaws, Article V, section 8)*
- J. A quorum for all meetings of the Representative Council shall consist of a majority of all elected members of the Representative Council. *(CTA Bylaws, Article V, sections 8 & 9)*

### VII. REPRESENTATIVES

- A. Representatives shall be elected by and from the Active membership for each faculty group. Such election shall be by open nominations and by secret ballot. *(CTA Bylaws, Article V, section 4a)*
- B. Representatives shall serve a term of \_\_\_\_\_ year(s). *(CTA Bylaws, Article V, section 4b)*
- C. Each faculty, site or site unit shall be entitled to at least one representative and shall have one representative for each \_\_\_\_\_ Active members on the staff, or major fraction thereof. *(CTA Bylaws, Article V, section 4a)*
- D. Active members who are not represented through an individual school group shall be counted as a special faculty group entitled to the same representation on the Representative Council as individual school faculty groups. *(CTA Bylaws, Article V, section 2a(3))*
- E. Vacancies: Vacancies in the office of Representative for whatever cause shall be filled by properly elected replacements. *(CTA Bylaws, Article V, section 5)*
- F. Representatives shall:
  - 1. Conduct constant and ongoing liaison between the Representative Council and the Active members of the faculty/site unit; *(CTA Bylaws, Article X, section 2)*
  - 2. Serve as the official channel through which written communications and publications can be easily and quickly transmitted between the Association and the members; *(CTA Bylaws, Article X, section 2)*
  - 3. Represent the views and input of the Active membership in votes taken in the Representative Council, conducting frequent and regular polls of such membership for this purpose; and *(CTA Bylaws, Article X, section 2)*
  - 4. Perform such additional duties as prescribed by the Executive Board.
- G. A Representative shall not conduct an election in which he/she is a candidate. *(CTA Elections Manual, The Requirements for Chapter Election Procedures, pg. 1)*

### VIII. OFFICERS

- A. The officers of the Association shall be President, Vice President, Secretary, and Treasurer. *(CTA Bylaws, Article VII, section 1)*



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- B. These officers shall be members in good standing of their local, state, and national associations as a condition for nomination to and service in their respective positions during their terms of office.
- C. These officers shall be elected by and from the Active membership of the Association. Such election shall be by open nominations and secret ballot. *(CTA Bylaws, Article VII, section 3)*
- D. Officers shall be elected for a term of \_\_\_\_\_ year(s), commencing on \_\_\_\_\_ of any calendar year. *(CTA Bylaws, Article VII, section 3)*
- E. A vacancy shall exist in the case of death, resignation, or inability to serve in any of the offices of the Association. If there is a vacancy occurring in the office of the President, the Vice-President shall assume the office. In the event a vacancy occurs in the other offices, a special election shall be held to elect successors to fill the unexpired terms. *(CTA Bylaws, Article VII, section 6)*
- F. The President shall be the chief executive officer of the Association and its policy advocate.

The President shall, subject to other provisions of these Bylaws:

- 1. Preside at all meetings of the Association, the Representative Council and Executive Board; *(CTA Bylaws, Article VII, section 7a and 7c)*
  - 2. Prepare the agenda for the meetings of the Association, the Representative Council and the Executive Board; *(CTA Bylaws, Article VII, section 7d)*
  - 3. Be the official spokesperson for the Association; *(CTA Bylaws, Article VII, section 7g)*
  - 4. Adhere to the governance documents of the Association, CTA, and NEA; *(CTA Standing Rule 4-1, section 1-J)*
  - 5. Appoint all chairpersons and members of all committees by the beginning of each school year; *(CTA Bylaws, Article VI, section 9-J)*
  - 6. Appoint the chairperson and members of the Bargaining Team by the beginning of each school year;
  - 7. Call meetings of the Association, Representative Council and the Executive Board; *(CTA Bylaws, Article VII, section 7b)*
  - 8. Propose the procedures for grievance processing for ratification by the Executive Board and the Representative Council; *(CTA Policies, Grievance Processing)*
  - 9. Suggest policies, plans and activities for the Association and be held responsible for the progress and work of the Association; *(CTA Bylaws, Article VII, section 7d)*
  - 10. Attend meetings of the Service Center Council of which the Association is a part; *(CTA Bylaws, Article VII, section 7g)*
  - 11. Attend other CTA/NEA meetings as directed by the Representative Council; and *(CTA Bylaws, Article VII, section 7g)*
  - 12. Order the payment of funds as necessary. *(as outlined in the CTA Treasurer's Handbook) (CTA Bylaws, Article VII, section 7)*
- G. The Vice-President shall:
    - 1. Serve as assistant to the President in all duties of the President;
    - 2. Assume the duties of the President in the absence of the President;
    - 3. Be responsible for the formation and distribution of the Association's calendar of activities; and
    - 4. Serve as coordinator of committee activities at the direction of the President.*(Clauses 1-4: CTA Bylaws, Article VII, section 8)*
  - H. The Secretary shall:
    - 1. Maintain a careful and accurate record of the proceedings of each meeting, regular or special, of the Association, Representative Council, and the Executive Board;

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

2. Be responsible for the distribution of minutes, notice of meetings, and agendas for all meetings to members of the Representative Council and Executive Board; and to the membership when appropriate;
3. Maintain an accurate roster of the membership of the Association and of all committees; and
4. Carry on the correspondence pertaining to the affairs of the Association as directed by the President.

*(Clauses 1-4: CTA Bylaws, Article VII, section 9)*

I. The Treasurer shall:

1. Receive all funds belonging to the Association and be responsible for their safekeeping and accounting;
2. Pay out such funds upon orders of the President; *(as outlined in the CTA Treasurer's Handbook)*
3. Provide a written financial report for each regular meeting of the Representative Council and Executive Board;
4. Be responsible for an annual audit of the books of the Association and distributing a summary of this audit to the membership; and
5. Be responsible for submitting membership and financial reports to CTA, NEA, and other agencies as required by law.

*(Clauses 1-5: CTA Bylaws, Article VII, section 9)*

IX. EXECUTIVE BOARD:

- A. The Executive Board shall be composed of the elected officers, (and may include members elected at-large from the Active membership, as long as this complies with the "one-person – one-vote" rule). *(CTA Bylaws, Article VI, section 2)*
- B. All members of the Executive Board shall be members in good standing of their local, state, and national associations as a condition for nomination to and service in this position. *(CTA Bylaws, Article VI, section 2)*
- C. The Executive Board shall meet prior to each regular meeting of the Representative Council and at such other times as the President may deem necessary, or upon written petition of a majority of the members of the Executive Board. *(CTA Bylaws, Article VI, section 6)*
- D. The duties and the responsibilities of the Executive Board are:
  1. Exercise all the business and organizational powers and duties for the Association as prescribed by law and these bylaws;
  2. Act for the Representative Council when school is not in session;
  3. Coordinate the activities of the Association;
  4. Adopt, amend and publicize the local Standing Rules for the Association;
  5. Recommend a budget for the Association to the Representative Council;
  6. Approve by majority vote the President's appointments and removal of committee members, including chairpersons;
  7. Approve by majority vote the President's appointments and by two-thirds (2/3) vote removal of bargaining team members;
  8. Direct the bargaining activities of the Association, subject to the policies established by the Representative Council; and
  9. Adopt grievance procedure and direct the grievance activities of the Association.

*(Clauses 1-9: CTA Bylaws, Article VI, section 9)*

- E. A quorum for all meetings of the Executive Board shall consist of a majority of the elected members of that body. *(CTA Bylaws, Article VI, section 8)*

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### X. MEETINGS OF THE GENERAL MEMBERSHIP:

- A. Meetings of the Association may be called by the President, the Executive Board, or by written petition of twenty percent (20%) of the Active membership.
- B. Notices of the Association meetings including date, place, time, and purpose of the meeting shall be made available to all members of the Association no less than two (2) days before the meeting except during crisis situations.
- C. For emergency meetings during crisis situations, the Executive Board shall adopt procedures to notify the Association membership of meeting dates, places and times.
- D. General Membership meetings that are connected electronically may be held if members may interact in the meeting. Members at all sites shall be able to be seen and heard by the entire Representative Council, allowing complete participation. A roll call attendance and subsequent votes shall be conducted by the secretary.
- E. A quorum for meetings of the Association shall be \_\_\_\_\_ percent of the Active membership. (*CTA Bylaws, Article VIII, section 2*)

### XI. BARGAINING TEAM

- A. The duties of the Bargaining Team are to represent and to bargain for all bargaining unit members.
- B. The President shall appoint all members, alternates, and the chairperson of the Bargaining Team with the concurrence of the Executive Board.
- C. Vacancies created by resignation or inability to serve shall be filled by the Executive Board from the list of alternates.
- D. The Executive Board, by two-thirds (2/3) vote, may remove a member of the Bargaining Team.
- E. Responsibility and authority for directing the bargaining process on behalf of the Association are vested in the Executive Board.
- F. All bargaining unit members shall be surveyed to determine contents of the proposed contract demands. The contract proposal shall be approved by the Representative Council.
- G. The Bargaining Team shall report its activities to the Executive Board as the Board requires.
- H. The Executive Board shall provide for the dissemination of information regarding bargaining and the activities of the Bargaining Team to the general membership.
- I. The Bargaining Team is empowered to reach tentative agreements with the district. Such agreements shall be considered tentative and not binding upon the Association until such agreements have been ratified by the membership in the appropriate unit(s) unless such ratification has been specifically waived or otherwise delegated by that active membership.

### XII. GRIEVANCE PROCESSING

- A. The Executive Board shall adopt, with the approval of the Representative Council, the procedures for grievance processing. (*CTA Policies, Grievance Processing*)
- B. These procedures shall include, but not be limited to, the following:
  - 1. Provide for representation to assist all members of the bargaining unit(s) in processing grievances;
  - 2. Training for handling grievances; and
  - 3. Evaluation of the Association's grievance policies and procedures.

### XIII. NOMINATIONS AND ELECTIONS

The Chapter shall follow and members are entitled to the rights contained in the *CTA Requirements for Chapter Election Procedures* published annually with the *CTA Elections Manual*. (*CTA Bylaws, Article VI, section 3; CTA Standing Rule 8-12*)

The chapter president must provide all Active members an opportunity to vote. Chapter presidents do not have the option of deciding that such elections shall not be held.

## REQUIREMENTS FOR CHAPTER GOVERNANCE DOCUMENTS

- A. The Elections Committee and Chairperson shall be appointed by the President and approved by the Executive Board to which it is responsible at the beginning of each school year. The duties of the Elections Committee shall be to:
  - 1. Ensure that all Association/CTA/NEA election codes and timelines are followed;
  - 2. Establish, develop and carry out election timelines and procedures;
  - 3. Prepare ballots for election of officers and such other elections as may be necessary;
  - 4. Count the ballots and certify the results; and
  - 5. Process initial challenges.
- B. Elections shall be conducted with:
  - 1. Open nomination procedure;
  - 2. Secret ballot;
  - 3. All Active member vote;
  - 4. Record of voters receiving or casting ballots; and
  - 5. Majority vote, unless otherwise specified.
- C. State Council Representative elections shall be conducted in accordance with CTA rules after the chapter or Service Center Council has been notified to do so by the CTA Elections and Credentials Committee.
- D. NEA State Delegate elections shall be conducted in accordance with CTA/NEA rules.
- E. NEA Local Delegate elections shall be conducted in accordance with CTA/NEA rules.

### XIV. COMMITTEES

- A. Committees, except as otherwise provided in these bylaws, may be established and discontinued by the Executive Board, subject to approval by the Representative Council. (*CTA Bylaws, Article VIII; CTA Standing Rule 7-1*)
- B. Each committee shall submit periodic reports to the Executive Board and Representative Council.
- C. The Executive Board shall direct the activities of all committees, subject to the policies established by Representative Council.

### XV. PARLIAMENTARY AUTHORITY

On all matters of procedure not otherwise covered by the provisions of these Bylaws, *Robert's Rules of Order*, latest revised edition, shall be followed at all meetings of the Association, the Representative Council, and the Executive Board. (*CTA Bylaws, Article XV*)

### XVI. AMENDMENTS

These Bylaws may be amended by a two-thirds (2/3) vote of the representatives at any regular or special meeting of the Representative Council. Notice in writing of a proposed Bylaws amendment shall have been submitted to the Secretary (Secretary-Treasurer) and provided to all members of the Association on or before the meeting preceding the one at which it is to be voted upon. (*CTA Bylaws, Article XVI*)