UNIT BYLAWS WORKSHEET FOR E-BYLAWS

INSTRUCTIONS: Fill out this worksheet to record information about your unit’s Bylaws. It provides a quick summary for building your Bylaws online with the E-Bylaws Program.

<table>
<thead>
<tr>
<th>UNIT INFORMATION (AUTO-FILLS IN E-BYLAWS WITH UNIT DATA):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Legal Name: __________________________________________</td>
</tr>
<tr>
<td>Name of PTA District: _______________________________________</td>
</tr>
<tr>
<td>Name of PTA Council: ________________________________________</td>
</tr>
<tr>
<td>School Street Address: _____________________________________</td>
</tr>
<tr>
<td>City: ___________________________ ZIP: ______________________</td>
</tr>
<tr>
<td>PTA Organization Date: __________________________ Grades in School: __________________</td>
</tr>
<tr>
<td>Fiscal Year Starts: __________________________ Fiscal Year Ends: __________________</td>
</tr>
<tr>
<td>National PTA ID #: __________________________ California PTA ID #: __________________</td>
</tr>
<tr>
<td>IRS Federal EI #: __________________________ FTB #: __________________ CT #: __________________</td>
</tr>
<tr>
<td>Individually Incorporated Unit – Corporation #: ______________</td>
</tr>
</tbody>
</table>

Membership Dues (p. 3): $______ per member (and program auto-fills the following data):

$2.25 National PTA, $2.00 California State PTA $______ District $______ Council

$______ (This amount remains in unit.)

Officers (p. 4): President, Secretary, Treasurer, Parliamentarian and Historian and
(Check all of your unit board positions):

☐ Executive Vice President EVP serves notice of president’s vacancy? ☐ Yes ☐ No
☐ Vice Presidents – How many? ____________ ☐ Corresponding Secretary
☐ Financial Secretary ☐ Auditor

Nominating Committee (p. 4): # of Members: ______________ # of Alternates: ______________

Date officers assume duties (month/day e.g. July 1) (p. 5): ________________________________

Association Meetings (p. 7-8, 15): (Week/Day e.g. Third Monday): ______________________________

Months: ______________________________________________________

Months: ______________________________________________________

Annual Meeting Month: ____________ Quorum (the greater of 11 or # of officers + 4): _______

Special Meetings called at written request of _________ (number) of board members.

Revised: January 2019
Board Meetings (p. 9-10, 15-16):  (Week/Day e.g. First Monday):  
Amount authorized for unbudgeted items between association meetings:  $
Special Meetings called at written request of  (number) of board members.
Quorum (the greater of 5 or majority of officers + 1):  

Council Membership (p. 10) (Auto-fills in E-Bylaws with Council Information):
Number of additional delegates for regular meeting:  
☐ Elected  OR  ☐ Appointed in  (Association meeting month.)
Length of term:  year(s)  # of additional delegates for Annual Meeting:  
Council Assessment (if any) (p. 16):  $  Due to council on:  

Vice Presidents (p. 15):  (Add area of responsibility and title for VPs – e.g. ‘Programs Chairperson’):
First Vice President serves as  
Second Vice President serves as  
Third Vice President serves as  
Fourth Vice President serves as  
Fifth Vice President serves as  
Sixth Vice President serves as  

Additional Check Signer (p. 15):  (Elected officer who does not reside in same household as president, treasurer, financial secretary, or auditor. Also, can’t be the secretary or the auditor):
President, treasurer and:  

Standing Committees (p. 16) (List committees that function all year):
☐ Membership  ☐ Programs  ☐ Fundraising  ☐ Hospitality  ☐ Family Engagement
Other Standing Committees:

Note:  If you have 10 or more standing committees, increase your minimum board and association quorums by half their number (e.g., 10 standing committees: increase quorums by 5).  Specialists such as a volunteer coordinator or webmaster are not included in this list.