

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.

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| UNIT INFORMATION (AUTO-FILLS IN E-BYLAWS WITH UNIT DATA): | |
| Unit Legal Name: | _____ |
| Name of PTA District: | _____ |
| Name of PTA Council: | _____ |
| School Street Address: | _____ |
| City: | ZIP: _____ |
| PTA Organization Date: | Grades in School: _____ |
| Fiscal Year Starts: | Fiscal Year Ends: _____ |
| National PTA ID #: | California PTA ID #: _____ |
| IRS Federal EI #: | FTB #: _____ CT #: _____ |
| Individually Incorporated Unit – Corporation #: _____ | |

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.

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.