

**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.

**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:** \$ \_\_\_\_\_ 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: 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:** # of Members: \_\_\_\_\_ # of Alternates: \_\_\_\_\_

Date officers assume duties (month/day e.g. July 1): \_\_\_\_\_

**Association Meetings:** (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:** (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** (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) \$ \_\_\_\_\_ Due to council on: \_\_\_\_\_

**Vice Presidents:** (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:** (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** (List committees that function all year):

Membership  Programs  Fundraising  Hospitality  Family Engagement

**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.