

# Unit Bylaws Information Summary

INSTRUCTIONS: Use your bylaws to fill in the blanks and create your own quick reference guide.

**Unit Legal Name:** \_\_\_\_\_

**PTA Council:** \_\_\_\_\_ **District:** \_\_\_\_\_

**PTA Organization Date:** \_\_\_\_\_ Fiscal Year Starts: \_\_\_\_\_ Fiscal Year Ends: \_\_\_\_\_

National PTA ID #: \_\_\_\_\_ California PTA ID #: \_\_\_\_\_ EI #: \_\_\_\_\_

FTB #: \_\_\_\_\_ CT #: \_\_\_\_\_ Incorporated Unit - Corporation #: \_\_\_\_\_

**Membership Dues:** \$\_\_\_\_\_ per member | \$2.25 National PTA | \$2.00 California State PTA  
\$\_\_\_\_\_ District | \$\_\_\_\_\_ Council | \$\_\_\_\_\_ (This amount remains in unit.)

**Officers:** President, Secretary, Treasurer, Parliamentarian, Historian & (check all your board positions):

Executive Vice President | EVP serves notice of president's vacancy?  Yes  No

VPs - 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. 3rd Monday): \_\_\_\_\_

Months: \_\_\_\_\_

Months: \_\_\_\_\_

Annual Meeting/Election Month: \_\_\_\_\_ | Quorum: \_\_\_\_\_

Special Meetings called at written request of \_\_\_\_\_ (number) of board members

**Board Meetings** (week/day - e.g. 1st Tuesday): \_\_\_\_\_

Amount authorized for unbudgeted items between association meetings: \$\_\_\_\_\_

Special Meetings called at written request of \_\_\_\_\_ (number) of board members | Quorum: \_\_\_\_\_

**Council Membership:** Council Assessment (if any): \_\_\_\_\_ Due to council on: \_\_\_\_\_

# additional delegates for regular meeting: \_\_\_\_\_  Elected OR  Appointed in (month): \_\_\_\_\_

Length of term: \_\_\_\_\_ year(s) | # of additional delegates for Annual Meeting: \_\_\_\_\_

**Vice Presidents:** (Add title/role for VPs- e.g. 'Programs Chairperson')

1st Vice President serves as \_\_\_\_\_

2nd Vice President serves as \_\_\_\_\_

3rd Vice President serves as \_\_\_\_\_

4th Vice President serves as \_\_\_\_\_

5th Vice President serves as \_\_\_\_\_

6th Vice President serves as \_\_\_\_\_

**Due Dates** - Send to council/district:

Board Roster \_\_\_\_\_

Annual Budget \_\_\_\_\_

PTA Insurance \_\_\_\_\_

Annual Financial Report \_\_\_\_\_

Adopted Audits \_\_\_\_\_

Gov't Filings: IRS 990 \_\_\_\_\_

FTB 199 \_\_\_\_\_

AG RRF-1 \_\_\_\_\_

**Additional Check Signer:** (Elected officer not residing in the same household as president, treasurer, financial secretary, or auditor. Also, cannot be the secretary or auditor): President, Treasurer and \_\_\_\_\_

**Standing Committees** (List committees that function all year):

Membership  Programs  Fundraising  Safety  Hospitality  Family Engagement

\_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_  \_\_\_\_\_