



2327 L Street, Sacramento, CA 95816  
 916.440.1985 • FAX: 916.440.1986  
 Email: info@capta.org • www.capta.org



## Unit Bylaws Worksheet for E-Bylaws

Items in *italics* are filled in by the e-bylaws program using unit, council and district information records. If your records differ or a change must be made, contact your council or district PTA parliamentarian.

<i>Unit Legal Name</i> _____
<i>Name of district</i> _____
<i>Name of council</i> _____
<i>School address (front cover) Street</i> _____
<i>City</i> _____ <i>ZIP</i> _____
<i>Organization Date (front cover)</i> _____
<i>Fiscal Year begins (p. 21)</i> _____ <i>ends</i> _____
<i>Grades in school (front cover)</i> _____
<i>(p. 22-23) National ID #</i> _____ <i>California ID #</i> _____
<i>IRS Federal EIN</i> _____ <i>CT No.</i> _____ <i>FTB No.</i> _____
<i>Individually incorporated unit Corporation No.</i> _____

**Membership Dues** (p. 3) \$ \_\_\_\_\_ per member (e-Bylaws will fill in the rest \$2.25 *National*; \$2.00 *California*; \$ \_\_\_\_\_ *District*; \$ \_\_\_\_\_ *Council*; \$ \_\_\_\_\_ remains in unit)

**Officers President, secretary, treasurer, and** (check those you have below)

Executive VP

Does the EVP serve notice of a vacancy in the presidency?  Yes  No, 1st VP does it

Vice Presidents - How many? \_\_\_\_\_

Corresponding Secretary

Financial Secretary

Is the Auditor an officer?  Yes  No

**Nominating Committee** (p. 5-6)

Number of members \_\_\_\_\_ Number of alternates \_\_\_\_\_

Date officers assume duties (p. 6) \_\_\_\_\_

**Association Meetings** (p. 13)

Week and Day of Month (e.g., second Tuesday) \_\_\_\_\_

Months \_\_\_\_\_

(must include nominating committee election month, election month, audit approval months)

Annual meeting month \_\_\_\_\_

Special meetings can be called upon the written request of \_\_\_\_\_ board members

Quorum (the greater of 11 or number of officers +4) \_\_\_\_\_

**Executive Board Meetings** (p. 14-16)

Meets once per month during school year. Week and day of month \_\_\_\_\_

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

Special meetings can be called upon the written request of \_\_\_\_\_ board members  
Quorum (the greater of 5 or majority\* of officers + 1) \_\_\_\_\_ (\*majority = more than half)  
If your auditor is appointed, appointment is ratified in the month of \_\_\_\_\_

**Committees**

Reports of committees filed with \_\_\_ president \_\_\_ historian [choose one]

**Council Membership**

Number of additional delegates for regular meeting \_\_\_\_\_

\_\_\_ **Elected** \_\_\_ **Appointed** [<< choose one] in \_\_\_\_\_ [association meeting month]

**Length of term** \_\_\_\_\_ **year/s.**

Number of additional delegates for annual election meeting \_\_\_\_\_

Council assessment (if any) (p. 24) \$ \_\_\_\_\_ due to council on \_\_\_\_\_

**Duties of Officers** (p. 7-13)

Reports of officers filed with \_\_\_ president \_\_\_ historian [choose one] (p. 12)

\_\_\_ [First] Vice President also serves as \_\_\_\_\_

\_\_\_ Second Vice President also serves as \_\_\_\_\_

\_\_\_ Third Vice President also serves as \_\_\_\_\_

\_\_\_ Fourth Vice President also serves as \_\_\_\_\_

\_\_\_ Fifth Vice President also serves as \_\_\_\_\_

\_\_\_ Sixth Vice President also serves as \_\_\_\_\_

**NOTE:** Be sure to add the title chairman, director, coordinator, etc. to the function above.

Example: First vice president also serves as **programs director** or **programs vice president**.

**Signature Authority**

Signed by president, treasurer, and \_\_\_\_\_ [elected officer/s]

[cannot be secretary or auditor; cannot reside in the same household as the president, treasurer, financial secretary, or auditor]

**Deposits**

If you have a financial secretary, does the financial secretary remit funds to the treasurer? (i.e., the financial secretary does not make deposits) \_\_\_\_\_ Yes, remitted to treasurer. \_\_\_\_\_ No

**Audits** (months)

Midyear Completed \_\_\_\_\_ to Board \_\_\_\_\_ Adopted \_\_\_\_\_

Fiscal Year-end Completed \_\_\_\_\_ to Board \_\_\_\_\_ Adopted \_\_\_\_\_

- If your fiscal year end is different from when your officers end office, a third audit is required.

Term End Completed \_\_\_\_\_ to Board \_\_\_\_\_ Adopted \_\_\_\_\_

**Standing Committees\*** (some typical committees are listed; use/add the ones you have) (p. 25)

\_\_\_ Membership     \_\_\_ Ways and Means     \_\_\_ Hospitality     \_\_\_ Programs

\_\_\_ Other (list) \_\_\_\_\_

**NOTES**

1. If you have ten or more standing committees, increase your minimum board and association quorums by half their number (e.g., 10 standing committees then increase quorums by 5).
2. Specialists (e.g., volunteer coordinator, newsletter editor, webmaster) are not committees and should not appear in the list of committees.