

Bylaws Information Summary

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

PTA Unit Legal Name (Article I): _____

PTA Council Name (Article I): _____ **PTA District Name** (Article I): Thirty-Third District PTA

PTA Organization Date (cover page): _____ Fiscal Year Starts (Article XIII, Section 7): July 1 Fiscal Year Ends : June 30

National PTA ID # (Article XIII, Section 2): _____ California PTA ID # (Article XIII, Section 1): _____ EI # (Article XIII, Section 3): _____

FTB # (Article XIII, Section 4): _____ CT# (Article XIII, Section 5): _____ Incorporated Units – Corporation # (Article XIII, Section 6): _____

Membership Dues (Article IV, Section 4): \$ _____ per member | \$3.25 National PTA | \$2.00 California State PTA
\$ _____ District | \$ _____ Council | \$ _____ (this amount remains in unit)

Officers (Article V, Section 2; check all board positions): ☒ President ☒ Secretary ☒ Treasurer ☐ Financial Reviewer

☐ Financial Secretary ☐ Executive Vice President ☐ VPs – How many? _____ ☐ Parliamentarian (appointed)

Date Officers Assume Duties (Article V, Section 8; month/day): _____

Nominating Committee (Article V, Section 4c) # of members: _____ # of alternates: _____

Association Meetings (Standing Rules 5; week/day – e.g. 3rd Monday): _____

Months (Standing Rules 5): _____

Annual Meeting/Election Month (Article VII, Section 2): _____ | Quorum (Article VII, Section 5): _____

Special Association Meetings called at written request of (Article V, Section 4a): _____ (number) of board members

Board Meetings (Standing Rules 9; week/day – e.g. 1st Tuesday): _____

Amount authorized for unbudgeted items between association meetings (Standing Rules 11): _____

Special Board Meetings called at written request of (Article VIII, Section 5): (number) of board members | Quorum (Article VIII, Section 6): _____

Council Membership: Council Assessment (Article IX, Section 2; if any): _____ Due to council on (Article IX, Section 2; if any): _____

additional delegates for regular district meeting (Article IX, Section 1a): _____ ☐ Elected or ☐ Appointed in (month): _____

of additional delegates for district Annual Meeting (Article IX, Section 1a): _____

Vice Presidents (Standing Rules 4; add title/role for VPs, e.g., 'Programs Chair')

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 Financial Reviews _____

Government Filings:

IRS 990N/990EZ/990 _____

FTB 199N/199 _____

AG RRF-1 _____

AG CT-TR-1 (if applicable) _____

SI-100 (if applicable) _____

Additional Check Signer (Article VI, Section 4; elected officer not residing in the same household as any other check signer. Also, cannot be the secretary or financial reviewer): President, Treasurer, and _____

Standing Committees (Standing Rules 16; list committees that function all year):

☐ Membership ☐ Programs ☐ Fundraising ☐ Safety ☐ Hospitality ☐ Family Engagement

☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____ ☐ _____