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Bylaws Review Report

Submit this form with **two full copies** (must be front & back) of your bylaws, along with 5 extra copies of JUST the signature page (2 sided also) with this **Review Report**. Bylaws can be sent to:

- **Your Area Coordinator, - or**
- **Directly-** submit this to the **District Parliamentarian** – c/o Trish, 247 Fauna Ave, Rohnert Park, CA 94928 14thLeadership@gmail.com

PTA Unit Name:		
PTA Council (or Area/City):		
Unit Contact Person, Title		
Address, City, Zip		
Phone		
Email:		
*Include self addressed stamped envelope if you prefer your approved bylaws be mailed back	Date Submitted to District:	
Org Date:	EIN#	
CA PTA ID:	FTB# -	Inc # - n/a
Nat'l PTA ID:	Registry of CT# -	

Read *Procedures for Bylaws Review* and *Instructions for Completing the Standard Bylaws* ~ pages i and ii of the bylaws. Visit www.capta.org to create the bylaws using the online format. If they print with "DRAFT" on the pages, it is NOT complete.

Indicate items that apply:

- ☐ Reviewed by Area Coordinator (sign) _____ (date) _____
☐ Newly Organized Unit ☐ Change of status ☐ Name change PTA to PTSA
☐ Updated to most current edition without changes Other _____
☐ Changes to unit bylaws made below

PROPOSED BYLAW CHANGES:

Pg #	Article #	Section #	Explanation of proposed amendment(s)
3	IV	4	<input type="checkbox"/> Dues change, former dues amount \$ _____
5	V	2	<input type="checkbox"/> Increased <input type="checkbox"/> Decreased the number of officers.
5/6	V	3g&7	<input type="checkbox"/> Changed month of election meeting.
11	VI	8	<input type="checkbox"/> Changed month (s) of audit reports.
13	VII	1	<input type="checkbox"/> Changed months of association meetings.
14	VII	5b	<input type="checkbox"/> Increased <input type="checkbox"/> Decreased quorums—Association meetings
15	VIII	2	<input type="checkbox"/> Increased <input type="checkbox"/> Decreased \$ Board may spend between assoc mtgs.
16	VIII	7b	<input type="checkbox"/> Increased <input type="checkbox"/> Decreased quorums—Exc. Board meetings.
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Who is responsible for preparing payment authorizations? ☐ Secretary ☐ Financial Secretary ☐ Other (describe)

- After the California State PTA parliamentarian signs the bylaws, Fourteenth District PTA will return them to the *contact person* noted above. The bylaws are **then** adopted by the association and signed and dated by the secretary. Please return one copy of your signature page to District PTA once adopted & signed.

Copy fee \$4 check # _____ or cash _____ ☐ Change of Status form to be included
 Rec'd _____ Sent to State _____ Returned by State _____ Sent to Unit/Area _____

Unit Bylaws Information Summary for E-Bylaws

Use this to prepare for inputting bylaws into e-bylaws system, This is also handy to keep as a quick reference for future reference or updating.

Unit Legal Name: _____ Name of district: Fourteenth District PTA

Name of council: out of Council

School address (front cover): Street: _____

City: _____ ZIP: _____

Organization Date (front cover): _____ (Franchise Tax # _____)

Fiscal Year begins: July 1 ends: June 30 Grades in school: _____

National ID #: _____ California ID #: _____ IRS Federal EIN: _____

Individually incorporated units: Corporation No.: n/a CT No. _____

Membership Dues (p. 3): \$ _____ per member (the program will fill in the rest)

(\$2.25 National; \$2.00 California; \$ 0.50 District; \$ N/A Council \$ _____ remains in unit; Forward \$4.75)

Officers: president, secretary, treasurer, and (check those you have below):

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

___ Vice Presidents - How many? _____ ___ Corresponding Secretary

___ Financial Secretary ___ Auditor (Elected? ___ Yes ___ No)

Nominating Committee

Number of members: _____ Number of alternates: 1 Date officers assume duties (p. 6): July 1

Association Meetings:

Week and Day of Month (e.g., second Tuesday): _____

Months: _____

(must include election month and audit approval months) Annual meeting month: _____

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

Quorum (the greater of 11 or # of officers +4): _____

Executive Board Meetings:

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 # of officers)+1): _____

If your auditor is appointed, appointment is ratified in the month of _____

Committees

Reports of committees filed with _____ president ___ historian [choose one]

Council Membership: no councils in district, only Areas.

Duties of Officers

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 _____

____ Seventh Vice President also serves as _____

____ Eighth Vice President also serves as _____

NOTE: Be sure to add title (chairman, director, coordinator etc.) to above.

Example: First vice president also serves as programs director.

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]

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:

Completed in (thru prior month-end) : ____ January ____ and ____ July ____

Presented to Board (months): ____ and ____

Approved by Association (months): ____ and ____

If your fiscal year end is different from when your officers take office, you must do a third audit:

Completed in ____ n/a ____, to Board in ____ n/a ____ adopted in ____ n/a ____

Standing Committees (some typical committees are listed; use/add the ones you have):

____ Membership ____ Ways and Means

____ Hospitality ____ Programs

____ Events Chair ____ Volunteer Coordinator

____ Other (list): _____