

Long Beach Council

PTA[®]

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The Red Book

For Unit Presidents
2023 – 2025

“Volunteers do not necessarily have the time; they
just have the heart.” -Elizabeth Andrew



This reference guide has been compiled to help leaders at the unit level navigate through proper PTA procedure, offer guidance and supply resources that enable unit leaders to confidently run their PTA.

Please be advised that information and dates are subject to change after printing. For the most up to date information, visit longbeachcouncilpta.org.

Many thanks to Lezlie Darling and the LBCPTA Board of Directors team of 1995-97 for creating the first issue for this resourceful Red Book.

PURPOSE OF THE CALIFORNIA STATE PTA

To promote the welfare of children and youth in home, school, community, and place of worship.

To raise the standards of home life.

To secure adequate laws for the care and protection of children and youth.

To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.

To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

CALIFORNIA STATE PTA CORE VALUES

The California State PTA is a professional, non-profit volunteer organization committed to the well-being of all children.

We believe every adult has a responsibility to ensure that all children develop to their full potential.

We believe parents are children's first teachers and that parent involvement is essential throughout a child's educational experience.

We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways.

We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.



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Dear Unit PTA President,

Welcome to Long Beach Council PTA and Congratulations for being a Unit President!

The purpose for this letter and resource book is to provide you with tools that will assist in your leadership role. We, at the LBCPTA are excited to be able to support you in this role. As you may already know, PTA is a multi-level organization with information being passed and communicated through channels (units, council, district, state and national). Even though the monthly tracker and other requirements can feel overwhelming, they exist to ensure your unit stays in good standing.

Membership dues and volunteer hours are just two examples of what passes all the way from the unit level to the national level. It is so important that our units complete the necessary forms and turn them in by due dates (listed on the tracker) so the council, district and state can then meet their own due dates.

This Red Book has been compiled by the LBCPTA Red Book Committee to help LBCPTA units fulfill requirements and have access to all sorts of PTA information. Unit presidents are encouraged to save copies of the Money Matters Form BEFORE turning into LBCPTA. It can be used as a receipt to go in the treasurer's binder. Saving copies of sections for other officers and committee chairs is highly recommended. Sharing knowledge only makes your PTA stronger.

Unit presidents are asked to please READ AHEAD in the Red Book. By doing so, you will be able to stay ahead of the paper trail and allow enough time to gather all the information from your officers. If this is your second term as a unit president, you can also be a great resource for other unit presidents, ask us how you can be a leader of leaders.

In the Months section of the Red Book, you will have an "at-a-glance look" at paperwork and fees due to LBCPTA each month. Unit presidents (UPs) will turn in their paperwork electronically to their area advisors along with the Money Matters form and the Unit President's Tracker at each UPs meeting. The tracker serves as your reminder of what to turn in and when. Recognition will be given at the end of the year to the units that have complied with meeting dates and action items on the Unit Tracker.

Long Beach Council PTA is committed to helping you have a smooth and successful presidency. Please do not hesitate to contact any one of us for assistance.

Warmest wishes for a great school year,

Long Beach Council PTA Board of Directors



Long Beach Council PTA Board of Directors & Officers Contact Info 2023-2025

Officer/Chair	Name	Email
President	Susana Gonzalez Edmond	president@longbeachcouncilpta.org
Executive Vice President - Convention, Office, Honorary Service Awards & PATs	Vacant	
(1st VP) Director of Leadership - Honor Unit Awards & Red Book	Vacant	leadership@longbeachcouncilpta.org
(2nd VP) Director of Membership	Carrie Medrano	membership@longbeachcouncilpta.org
(3rd VP) Director of Communications	Hazel Quimpo	communications@longbeachcouncilpta.org
Program/Directories & Newsletters		
Social Media	Jeneva Snyder	socialmedia@longbeachcouncilpta.org
Website	Christina Wilson	website@longbeachcouncilpta.org
(4th VP) Director of Legislation	Dr. Arnedra Jordan	legislation@longbeachcouncilpta.org
LBUSD Liaison		
Resolutions		
Sacramento Safari		
(5th VP) Director of Programs –	Vacant	programs@longbeachcouncilpta.org
Inspiration		
Reflections	Shannon Hillesheim	reflections@longbeachcouncilpta.org
Founders Day		
In & Out Meeting		
(6th VP) Director of Education	Vacant	education@longbeachcouncilpta.org
Parent Education		
Ed Celebration		
Teacher of the Year		toty@longbeachcouncilpta.org
LBCPTA HS Scholarships		scholarships@longbeachcouncilpta.org
(7th VP) Director of Community Concerns	Christina Wilson	communityconcerns@longbeachcouncilpta.org
Bethune/Homeless Assistance	Christina Wilson	
Diversity, Equity, and Inclusion		dei@longbeachcouncilpta.org
Kindred Schools	Christina Wilson	finsecretary@longbeachcouncilpta.org
Red Ribbon/Healthy Lifestyles Week		healthandsafety@longbeachcouncilpta.org
Recording Secretary	Jennifer Peniche	recsecretary@longbeachcouncilpta.org
Treasurer	Raphael Nendel-Flores	treasurer@longbeachcouncilpta.org
Financial Secretary	Vacant	finsecretary@longbeachcouncilpta.org
Auditor	Vacant	auditor@longbeachcouncilpta.org
Historian	Mariel Cisneros	historian@longbeachcouncilpta.org
Area 1 Advisor	Emma Auger	AA1@longbeachcouncilpta.org
Area 2 Advisor	Vacant	AA2@longbeachcouncilpta.org
Area 3 Advisor	Vacant	AA3@longbeachcouncilpta.org
Area 4 Advisor	Vacant	AA4@longbeachcouncilpta.org
Parliamentarian	Vacant	parliamentarian@longbeachcouncilpta.org

2023 - 2025 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH ALONG WITH THE PAPERWORK DUE. COPIES WITH AN "E" HAVE THE OPTION OF SUBMITTING BY EMAIL OR HARD COPY TO THEIR AREA ADVISOR. COVID MAY CAUSE SOME ADJUSTMENTS DURING THE YEAR.

Unit Name: _____ PTA President: _____

Date	Item	Copies	Area Advisor Notes & Initials
Aug. 8	Red/Green Book Training Meetings		
Sep. 12	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (May - August)	E or HC	
Sect 9	Unit Treasurer's Annual Report (UTAR) 7/1/22 to 6/30/23	E or HC	
Sect 9	Year-End Audit (January 2023 - June 2023)	E or HC	
Sect 9	Taxes - 199 State (7/1/22 - 6/30/23)	E or HC	
Sect 9	Taxes - 990 Federal (7/1/22 - 6/30/23)	E or HC	
Sect 9	CT-TR-1 & RRF-1 (7/1/22 - 6/30/23)	E or HC	
Sect 5	Board & Association Meeting Minutes (Last Assoc. Meet.)		
Sect 12	Officer, Committee Chair & Delegate Contact Info	E only	
Sect 5	Unit Bylaws Status Form	E or HC	
Oct. 10	UPs Executive Board Meeting		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 4	Council Assessment Fee \$100.00		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (September)	E or HC	
Sect 9	Unit Budget (Approved by association in September)	E or HC	
Sect 5	Board & Association Meeting Minutes (September)	E or HC	
Sect 9	Conflict/Whistleblower Forms	E or HC	
Nov. 14	Council Association Meeting BRING (min of 2) DELEGATES!		
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 4	Insurance Premium - Amount to be announced by October UPs		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer's Report (October)	E or HC	
Sect 5	Board & Association Meeting Minutes (October)	E or HC	
Sect 12	Worker's Compensation Form	E or HC	
Sect 10	33rd District Unit Program/Directory Award Submission Form	E or HC	
Sect 10	Reflections Student Entry Forms	E or HC	
Sect 10	Reflections Unit Participation Form	E or HC	
Sect 4	Delegate Names:		



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Date	Item	Copies	Area Advisor Notes & Initials
Jan 9 UPs Executive Board Meeting			
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (November & December)	E or HC	
Sect 5	Board & Association Meeting Minutes (Nov & Dec)	E or HC	
Feb. 13 UPs Executive Board Meeting FOUNDERS DAY			
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 10	33rd District PTA Free Will Offering		(Chk #): (\$):
Mar. 11 Council Association Meeting & ELECTION - BRING Min of 2 DELEGATES!			
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (January & February)	E or HC	
Sect 9	Mid-Year Audit (July 2023 – December 2023)	E or HC	
Sect 12	Annual Historians Report	E or HC	
Sect 9	Budget Update (Year-to-Date Actuals)	E or HC	
Sect 5	Board & Association Meeting Minutes (Jan & Feb)	E or HC	
Sect 8	33rd District Unit Recognition Awards Application	E or HC	
Sect 4	Delegate Names:		
Apr. 9 UPs Executive Board Meeting			
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 9	Treasurer’s Report (March)	E or HC	
Sect 12	2024-2025 33rd District Officers Contact Form	E only	
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Sect 8	LBCPTA Teacher of the Year Entry Form and Essay	E or HC	
May 14 UPs Executive Board Meeting			
Sect 12	Money Matters Form	E or HC	
Sect 6	Membership Dues (#):		(Chk #): (\$):
Sect 8	PAT Award Certificate Order Form	E or HC	(Chk #): (\$):
Sect 4	LBCPTA In & Out Meeting & Awards (6/4/24)		(Chk #): (\$):
Sect 9	Treasurer’s Report (April)	E or HC	
Sect 5	Board & Association Meeting Minutes (April)	E or HC	
Sect 12	Unit Program Report	E or HC	
Jun 4 Council Association Meeting & In & Out Celebration - BRING Min of 2 DELEGATES!			