

Long Beach Council



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The Red Book

For Unit Presidents
2020 – 2021

"You can't go back and change the beginning,
but you can

Start where you are

and change the ending."

-C.S. Lewis



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 lbcouncilpta.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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Long Beach Council



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July 1, 2020

Hello Long Beach Council PTA units!

I want to first start by saying *thank you* to the previous 2 council executive boards that I have had the privilege to serve with and learn from all while supporting all of you and your units. I am humbled, nervous, excited, and really looking forward to continuing to fulfill my two-year term serving the PTA units in the Long Beach Council. The council board is always shifting in leadership, as you do in your units. Fortunately, a lot stay, or move up to serve on Thirty-Third District PTA and California State PTA! How lucky are we that we have such great mentors!

One thing a council president is asked to do is to have a theme for our term. Last year I introduced my theme at our annual Officer In & Out meeting in June. "You can't go back and change the beginning, but you can start where you are and change the ending." – C.S. Lewis

Start Where You Are

It's time to start the new PTA year. We'll be here to help you along the way. Please utilize all the many resources at your fingertips. We provide each unit with a Red Book and a Green Book – guides to have a successful year. The PTA websites from our local one on up to National PTA hold everything you might want to know about PTA. We also updated our T-shirt theme design with the phrase "Why Do You PTA?"

This past end of school year was a challenging one with the worldwide Covid-19 pandemic, school closures, job losses, civil unrest, and country wide protests over the killings of black citizens. Racism, inequality, inequity – are not okay. PTA has always stood by All Children and Families, and we stand with our black children and families now. We need to get back to our advocacy roots and stand up for what is just and right.

PTA may look different this year in our units. But at the core, it has never changed. Advocating for inclusive education, funding for our schools, and utilizing CAPTA resolutions to accomplish that with our elected officials. We all get to be creative in holding our meetings virtually, communicating more effectively in the physical distance world we are living in. Creating programs that can be done from home, and if needed, fundraising in a whole new way. We don't know how long our students will be learning from home this school year. PTA can be such a support for ALL the students in your school community.

Yours in PTA,

Erica Dawson, President 2019-2021



Dear Unit PTA President,

Welcome to Long Beach Council PTA! As a Unit President, you are to be congratulated for being willing to take on such an important responsibility. The LBCPTA board members are looking forward to working with you during this school year.

PTA is a multi-level organization with information being passed and communicated through channels (units, council, district, state and national). 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 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 make copies of the Money Matters Form BEFORE turning into LBCPTA. It can be used as a receipt to go in the treasurer's binder. Making 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.

In the Months section 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 to their area advisors along with the Money Matters form and the pink 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

Contact Info 2019-2021

longbeachcouncilpta.org


@LBC_PTA



@LBCPTA



@LBCPTA



| Officer/Chair | Name | Email |
|---|---------------------------|--|
| President | Erica Dawson | president@longbeachcouncilpta.org |
| Executive Vice President - Convention, Office, Honorary Service Awards & PAT's | open | |
| (1st VP) Director of Leadership - Honor Unit Awards & Red Book | Shannon Hilleshiem | leadership@longbeachcouncilpta.org |
| (2nd VP) Director of Membership | Christina Wilson | membership@longbeachcouncilpta.org |
| (3rd VP) Director of Communications | open | |
| Program/Directories & Newsletters | Michael Morgan | communications@longbeachcouncilpta.org |
| Social Media | | |
| Website | Andrea Wader | website@longbeachcouncilpta.org |
| (4th VP) Director of Legislation | open | |
| LBUSD Liaison | | |
| Resolutions | | |
| Sacramento Safari | | |
| (5th VP) Director of Programs – | Kathy Voreh-Husek | programs@longbeachcouncilpta.org |
| Inspiration | | |
| Reflections | Kim Erkman | reflections@longbeachcouncilpta.org |
| Founders Day | | |
| In & Out Meeting | | |
| (6th VP) Director of Education | Diana Craighead | education@longbeachcouncilpta.org |
| Parent Education | | |
| Ed Celebration | | |
| Teacher of the Year | Christina Wilson | toty@longbeachcouncilpta.org |
| LBCPTA HS Scholarships | Jodie Storey | scholarships@longbeachcouncilpta.org |
| (7th VP) Director of Community Concerns | Bridget Sramek | communityconcerns@longbeachcouncilpta.org |
| Bethune/Homeless Assistance | | |
| Diversity, Equity, and Inclusion | Sarah Derrick | dei@longbeachcouncilpta.org |
| Health & Safety | | |
| Red Ribbon/Healthy Lifestyles Week | | |
| Recording Secretary | Linda Simpkins | recsecretary@longbeachcouncilpta.org |
| Treasurer | Flora Farzad | treasurer@longbeachcouncilpta.org |
| Financial Secretary | Lori Castellon | finsecretary@longbeachcouncilpta.org |
| Auditor | Deborah Borders | auditor@longbeachcouncilpta.org |
| Historian | Shenia Dennis | historian@longbeachcouncilpta.org |
| Area 1 Advisor | Nora Howit | AA1@longbeachcouncilpta.org |
| Area 2 Advisor | Maggie Magno | AA2@longbeachcouncilpta.org |
| Area 3 Advisor | Sarah Derrick | AA3@longbeachcouncilpta.org |
| Area 4 Advisor | Tina Bone | AA4@longbeachcouncilpta.org |
| Parliamentarian | Elena Wraight | parliamentarian@longbeachcouncilpta.org |

2020 – 2021 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 & Signature Only |
|-----------------------------|--|---------|-------------------------------------|
| Aug. 11th | Red/Green Book Training Meeting | | |
| | | | |
| Sep. 8th | UPs Executive Board Meeting | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (May – August) | E or HC | |
| p. 145 | Unit Treasurer's Annual Report (UTAR) 7/1/19 to 6/30/20 | E or HC | |
| p. 142 | Year-End Audit (January 2020 – June 2020) | E or HC | |
| p. 148 | Taxes – 199 State (7/1/19 – 6/30/20) | E or HC | |
| p. 148 | Taxes – 990 Federal (7/1/19 – 6/30/20) | E or HC | |
| p. 151&154 | CT-TR-1 & RRF-1 (7/1/19 – 6/30/20) | E or HC | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (Last Assoc. Meet.) | E or HC | |
| p. 193 | Officer, Committee Chair & Delegate Contact Info | E only | |
| p. 52 | Unit Bylaws Status Form | E or 1 | |
| | RESERVATIONS for 33 rd Legislative Conference (10/8/20) | | (Chk #): (\$): |
| | RESERVATIONS for 33 rd Fall Meeting & Training (TBD) | | (Chk #): (\$): |
| Oct. 13th | UPs Executive Board Meeting | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (September) | E or HC | |
| p. 30 | Council Assessment Fee \$100.00 | | |
| p. 123 | Unit Budget (Approved by association in Sep.) | E or HC | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (September) | E or HC | |
| p. 162 | Conflict/Whistleblower Forms | E or HC | |
| p. 102 | PAT Award Certificate Order Form (Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| | RESERVATIONS for 33 rd Presidents & Admin. Conference (11/12/20) | | (Chk #): (\$): |
| Nov. 10th | Council Association Meeting BRING (min of 2) DELEGATES! | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (October) | 1 | |
| p. 31 | Insurance Premium – \$258.00 | | (Chk #): (\$): |
| | Worker's Compensation Form - ALL UNITS MUST FILL OUT AND TURN IN E or HC -See last page of RB | | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (October) | 1 | |
| p. 102 | PAT Award Certificate Order Form (Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| p. 105 | 33 rd District Unit Program/Directory Award Submission Form | 2 | |
| | Reflections Student Entry Forms | 2 | |
| p. 184 | Reflections Unit Participation Form | 1 | |
| p. 32 | Delegate Names: | | |

Highlighted items are **REQUIRED**. No unit will be considered for an award unless these items are turned in. Please make sure to communicate with your Area Advisor monthly.

2020 – 2021 Unit Presidents Tracker

Please turn in this form every month, along with the paperwork due. Monies turned in must include a Money Matters form. COVID may adjust how paperwork is submitted, thank you for continuing to stay connected and up to date on the paperwork.

| Date | Item | Copies | Area Advisor Notes & Initials |
|-----------------------------|---|---------|-------------------------------|
| Jan. 12th | UPs Executive Board Meeting | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (November & December) | E or HC | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (December & January) | E or HC | |
| p. 102 | PAT Award Certificate Order Form (Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| p. 180 | RESERVATIONS LBCPTA Founders Day Meeting | | (Chk #): (\$): |
| | RESERVATIONS for 33rd District Annual Meeting | | (Chk #): (\$): |
| | | | |
| Feb. 9th | UPs Executive Board Meeting FOUNDERS DAY | | |
| p. 198 | Money Matters Form | | |
| p. 180 | 33 rd District PTA Free Will Offering | | (Chk #): (\$): |
| | RESERVATIONS for 33 rd Diversity & Inclusion Conference | | (Chk #): (\$): |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| Mar. 9th | Council Association Meeting & ELECTION - BRING Min of 2 DELEGATES! | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (January & February) | E or HC | |
| p. 142 | Mid-Year Audit (July 2020 – December 2020) | E or HC | |
| p. 194 | Annual Historians Report | E or HC | |
| p. 123 | Budget Update (Year-to-Date Actuals) | E or HC | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (January & February) | E or HC | |
| p. 102 | PAT Award Certificate Order Form(Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| p. 109 | 33 rd District Unit Recognition Awards | 2 | |
| p. 35 | RESERVATIONS for 33 rd Spring Awards & Meeting (4/22/21) | | (Chk #): (\$): |
| p. 32 | Delegates Names: | | |
| Apr. 13th | UPs Executive Board Meeting | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (March) | E or HC | |
| p. 193 | 2021-2022 33rd District Officers Contact Form | E only | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (March) | E or HC | |
| p. 102 | PAT Award Certificate Order Form (Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| p. 104 | LBCPTA Teacher of the Year (TOTY) Entry Form and Essay | E or HC | |
| | Unit Information Sheet & Fees for CAPTA Convention | TBD | (Chk #): (\$): |
| | PTA Membership Envelopes | | (Chk #): (\$): |
| | Thirty-Third District Calendars | | (Chk #): (\$): |
| May 11th | UPs Executive Board Meeting | | |
| p. 198 | Money Matters Form | | |
| p. 134 | Treasurer's Report (April) | E or HC | |
| p. 68 | Membership Dues (#): | | (Chk #): (\$): |
| p. 47 | Board & Association Meeting Minutes (April) | E or HC | |
| p. 102 | PAT Award Certificate Order Form (Praise, Appreciation, & Thanks) | | (Chk #): (\$): |
| p. 37 | RESERVATIONS LBCPTA In & Out Meeting & Awards (6/1/21) | | (Chk #): (\$): |
| | RESERVATIONS 33 rd Spring Training (6/5/21) | | (Chk #): (\$): |
| p. 200 | Volunteer Recognition Form | | |