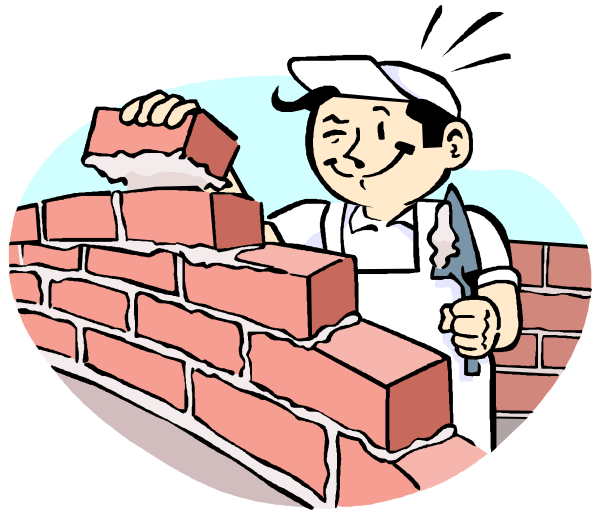


# PTA BASICS SECTION

## Organizational Structure

<http://toolkit.capta.org/know-the-pta/organizational-structure/>

**Unit** PTAs are organized and chartered in conformity with rules and regulations as prescribed in the bylaws of the California State PTA. These units are self-governing bodies for the purpose of planning programs and activities to meet local community needs. However, they are required to observe the policies and procedures of the California State PTA and/or National PTA.



***Your school unit is a part of Long Beach Council PTA***

**Councils** of PTAs are created by the California State PTA for the purpose of collaboration, leadership training, and coordination of efforts of the member units.

***Long Beach Council PTA is a part of Thirty-third District PTA.***

**District PTAs** are geographical divisions of the California State PTA, established to carry out its programs. District PTAs shall provide training and support for their units and councils. All PTA districts organized after July 1, 1980, are required to have number designations.

***Thirty-Third District PTA is a part of California State PTA.***

**The California State PTA** (California Congress of Parents, Teachers, and Students, Inc.) is a branch of the National PTA, serving as a connecting link between the national organization and its membership within the state. The California State PTA shall provide training and support for its units/councils/districts.

***California State PTA is a part of National PTA.***

**The National PTA** (National Congress of Parents and Teachers) is a volunteer educational organization, founded in Washington, D.C., in 1897. Branches of the National PTA have been established in all fifty United States, the District of Columbia, U.S. Virgin Islands, Puerto Rico and in schools for American dependents in Europe and the Pacific area.

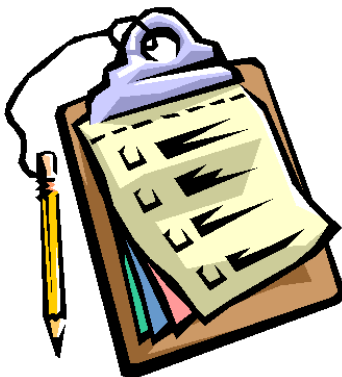
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## ***Checklist for a Healthy PTA***

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### **Membership Enrollment**

- ✓ Is an initial membership campaign held toward the beginning of the school year?
- ✓ Are continuing opportunities provided for parents and staff to join? (Membership is year-round.)
- ✓ Is membership per capita sent through channels at least monthly and by deadlines?



### **Treasurer's Reports**

- ✓ Are written reports presented/filed monthly? Are balances, receipts and disbursements recorded in the minutes each month?
- ✓ Is each check approved/ratified and listed?
- ✓ Are reports presented at both executive board and association meetings?

### **Minutes**

- ✓ Is an attendance record kept for all meetings?
- ✓ Are minutes kept for all meetings?
- ✓ Are all action items recorded, including approval of budget, all expenses and all fundraising activities?

### **Audits**

- ✓ Are audits prepared and adopted in accordance with the bylaws and PTA financial procedures?
- ✓ Are audits conducted at least twice a year? And whenever there is a change in check signers?

### **Bylaws**

- ✓ Are bylaws reviewed yearly and updated (sent through channels for approval) every three years?

### **Annual Reports**

- ✓ Are volunteer hours being recorded?
- ✓ Are annual reports filed by the deadline?

### **Financial Procedures**

- ✓ Are financial procedures in accordance with recommended PTA policies and procedures?
- ✓ Is the budget approved and actual revenues and expenditures compared at least quarterly?
- ✓ Is the insurance premium and the workers comp form/remittance sent in by deadline?
- ✓ Are all checks signed by two authorized officers? And are all expenditures properly authorized?

### **Leadership**

- ✓ Do members of the executive board work well together?
- ✓ Does the PTA attract and retain new leadership?
- ✓ Are new, qualified candidates nominated for office each year?
- ✓ Do leaders attend council/district PTA meetings and take advantage of training opportunities?
- ✓ Do leaders communicate effectively with members?