

2018 – 2019 Unit Presidents Tracker

PLEASE TURN IN THIS FORM EVERY MONTH, ALONG WITH THE GREEN SHEETS THAT CAN BE FOUND IN THE MONTHS SECTION OF THE RED BOOK.

Unit Name: _____ PTA President: _____

Date	Item	Copies	Area Advisor Notes
Aug. 14th	Red Book Training Meeting		
Sep. 11th	UPs Executive Board Meeting		
p. 107	September Turn-in & Money Matters Form	1	
p. 79	Treasurer's Report (May – August)	1	
p. 105	Unit Treasurer's Annual Report (UTAR) 7/1/17 to 6/30/18	2	
p. 85	Year End Audit (January 2018 – June 2018)	2	
p. 40	Membership Dues (#):		(Chk #): (\$):
p.113	RESERVATIONS for 33 rd Legislative Conference		(Chk #): (\$):
p. 111	RESERVATIONS for 33 rd Fall Meeting & Training		(Chk #): (\$):
p. 142	Bethune Donation		
Oct. 9th	UPs Executive Board Meeting		
p. 119	October Turn-in & Money Matters Form	1	
p. 79	Treasurer's Report (September)	1	
p. 109	Council Assessment Fee \$100.00		
p. 77	Unit Budget (Approved by association in Sep.)	2	
p. 125	Officer, Chairman & Delegate List (OCD List)	2	
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 123	RESERVATIONS for 33 rd Presidents. & Admin. Conference		(Chk #): (\$):
p. 142	Bethune Donation		
Nov. 13th	Council Association Meeting BRING DELEGATES!		
p. 127	November Turn-in & Money Matters Form		
p. 79	Treasurer's Report (October)	1	
p. 130	Taxes - 199 State (7/1/17 – 6/30/18)	2	
p. 130	Taxes - 990 Federal (7/1/17 – 6/30/18)	2	
p. 133	RRF-1 (7/1/17 – 6/30/18)	2	
p. 121	Insurance Premium – amount to be determined		(Chk #): (\$):
p. 137	Worker's Compensation Form - ALL UNITS MUST FILL OUT AND TURN IN		
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 155	Unit Program/Directory	2	
	Award Form	1	
p. 160	Reflections Entries & Forms	2	
p. 121	Delegates (#):		
p. 142	Bethune Donation		

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 on a monthly basis.

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Date	Item	Copies	Area Advisor Notes
Jan. 8th	UPs Executive Board Meeting		
p. 167	January Turn-in and Money Matters Form	1	
p. 79	Treasurer's Report (November & December)	1	
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 174	RESERVATIONS LBCPTA Founders Day Meeting		(Chk #): (\$):
p. 173	RESERVATIONS for 33rd District Annual Meeting		(Chk #): (\$):
p. 172	RESERVATIONS for 33rd District Teen Scene Conference		(Chk #): (\$):
p. 170	RESERVATIONS Sacramento Safari		(Chk #): (\$):
p. 161	Reflections Information Form	1	
p. 142	Bethune Donation		
Feb. 12th	UPs Executive Board Meeting FOUNDERS DAY		
p. 175	February Turn-in and Money Matters Form	1	
p. 179	33 rd District PTA Free Will Offering		(Chk #): (\$):
p. 180	RESERVATIONS for 33 rd Diversity & Inclusion Conference		(Chk #): (\$):
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 142	Bethune Donation		
Mar. 12th	Council Association Meeting & ELECTION - BRING DELEGATES!		
p. 187	March Turn-in and Money Matters Form	1	
p. 79	Treasurer's Report (January & February)	1	
p. 85	Mid-Year Audit (July 2018 – December 2018)	2	
p. 191	Annual Historians Report	2	
p. 77	Budget Update (Year-to-Date Actuals)	2	
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 195	<u>LBCPTA Communications (Copies of 3 different issues)</u> Award Form	<u>2 each</u> 1	
p. 194	RESERVATIONS for 33 rd Spring Awards & Meeting		(Chk #): (\$):
p. 177	Delegates (#):		
p. 198	LBCPTA High School Scholarship Applications	1	
p. 142	Bethune Donation		
Apr. 9th	UPs Executive Board Meeting		
p. 199	April Turn-in and Money Matters Form	1	
p. 79	Treasurer's Report (March)	1	
p. 209	2019-2020 Officers Contact Form	1	
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 207	Teacher of the Year (TOTY) Entry Form and Essay	1	
p. 203	Unit Information Sheet & Fees for CAPTA Convention	1	(Chk #): (\$):
p. 199	PTA Membership Envelopes		(Chk #): (\$):
p. 199	Thirty-Third District Calendars		(Chk #): (\$):
p. 142	Bethune Donation		
May 14th	UPs Executive Board Meeting		
p. 211	May Turn-in and Money Matters Form	1	
p. 79	Treasurer's Report (April)	1	
p. 40	Membership Dues (#):		(Chk #): (\$):
p. 214	RESERVATIONS LBCPTA In & Out Meeting & Awards		(Chk #): (\$):
p. 223	RESERVATIONS 33 rd Spring Training		(Chk #): (\$):
p. 217	Teacher/Community Recognition Form	1	
p. 219	Unit Program Report Form	1	
p. 221	Bylaws Status Form	1	
p. 142	Bethune Donation		

Long Beach Council



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