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Due Dates

2016-17 CALENDAR
will be approved at June
4th association meeting
and posted after that.

Remittances of \$

**PLEASE NOTE:
CHANGE OF ADDRESS
for remittances**

All membership and insurance remittances, etc should be sent - **with a remittance form** found in Peralta's **list of forms** to:

Nancy Mitchell
Peralta District PTA
44999 Cree Court
Fremont, CA 94539

Please remember that if you are in a council, your remittances go to your council.

Sending in Reports

Email copies of all
Required Paperwork
and Financial Reports to
financialreports
@peraltdistrictpta.org

Important Forms

Various PTA forms can be found on our website at **PTA Forms** and also in the **Forms Chapter of the Toolkit**.

Please use PTA forms and formats; they were designed to provide transparency and adherence to guidelines.

District PTA Officers

Greetings!

We are here to support and assist you!



**DID
YOU
KNOW
???**

With approximately 160 PTAs in Alameda County, Peralta District PTA does not have the volunteer power - *yes, we're all volunteers too* - to outreach to each PTA on a regular basis....but we will reply and help if you contact us. That's why we are here! **We love questions...** Our emails are in the column to the left and our phone numbers can be found....

Please read this newsletter when it arrives in your inbox by the first of every month. This is the best way we know of to provide the reminders and information every PTA needs to function well.

Are we reaching the correct officers?

We want to stay in touch with the right people - current officers at your PTA - and at this time of year we try and add the newly elected 2016-17 presidents to the newsletter distribution list - if they have been entered into PTAEZ - so they can receive our communications!

Remember: We expect our PTAs to enter their own contact information in PTAEZ.

Contact information for all 2016-17 officers was to be entered into PTAEZ by June 1 or California State PTA considers your PTA "not in good standing". If you have not yet done so, please do it ASAP.

Directions on how to enter contact information may be found at <http://www.ptaez.com/#!officer-contact/c1gqh>



Contact newsletter@peraltdistrictpta.org if you have difficulty.

If your PTA has not elected 2016-17 officers and is having difficulty, please contact the Peralta District PTA president to let us know the status and allow us to help.

DON'T FORGET

You are still welcome to attend training even if you didn't RSVP!

A list of workshops and the registration form can be found **HERE**
Bringing a completed registration form & \$15 check will speed the "check-in" process.

**Peralta District PTA's
Annual Leadership Training
is June 4th, 2016 from 8:15AM to 2:30PM**

Peralta District PTA officers are here to help you; our mission is to provide support and information to all the PTA/PTSA units in Alameda County.

President: [Linda Dewlaney](#)
1st VP-Leadership: *open*
2nd VP-Programs: [Pam Chang](#)
3rd VP-Membership: *open*
Treasurer: [Nancy Mitchell](#)
Financial Secretary: *open*
Secretary: [Susan Nathan](#)
Historian: [Poon Yee](#)
Newsletter:
[Carol-Ann Koch-Weser](#)
Parliamentarian:
[Allison Wiscombe](#)
Website: [webmaster](#)

Council or Out of Council?

COUNCILS

Units in a council should communicate first with, and remit any monies and reports to, their council. Contact the council president if you don't know how to get in touch with the council.

Alameda: [Jennifer Hastings](#)
Berkeley: [Christine Staples](#)
Fremont: [Liz Fischer](#)
Pleasanton: [Katie Brunner](#)
San Lorenzo:
[Mark Manzanares](#)

OUT OF COUNCIL

PTAs in the following areas are considered "out of council" or "OOC" and communicate directly with, and remit monies to, Peralta District PTA:

Albany
Castro Valley
Hayward
Livermore
New Haven/Union City
Newark
Oakland
San Leandro

Resources & Links

[Peralta District PTA](#)
[California State PTA](#)
[National PTA](#)

Services:

[e-Bylaws](#)
[PTAEZ](#)
[PTA Merchandise Store](#)

sabado, 4 de junio Entrenamiento Annual para Lideres de PTA

Está en la mesa directiva, ¿ahora qué?

The cost is \$15 per person.

Membership envelopes can also be purchased - first come, first served - the cost is \$15 for 500 envelopes.

Important Year End Tasks:

Ensure all remaining 2015-16 memberships (per capita dues) have been remitted.

(Remember to print out a final membership list for the president, secretary and for the procedure book so that each member can be contacted next year to re-join.)

Ensure that contact information for the 2016-17 officers have been entered into PTAEZ.

The current treasurer must complete a Year End Financial Report - after the close of the fiscal year, which is June 30th - before turning the books over to the current auditor.

The 2015-16 treasurer may also complete the 2015-16 tax filings right after June 30th, even though they are not due until November 15, 2016.

All PTAs must file Tax Returns

The current year's auditor should receive from the 2015-16 treasurer - as soon as possible after June 30th - all the required materials to prepare a year end Audit.

A year end Audit should be completed after the close of the fiscal year. Read All About Audits

(Remember that next year's budget should start with the audited ending balance for this year.)

Every position should complete their Procedure Book and turn it and all other files over to their successor....or the president (if no successor has been found).

The Secretary's "minutes book" should be completed, either by pasting all the documents into the Secretary's book or having them all professionally bound. See [Secretary's job description](#)
(Remember minutes are the official, legal and permanent record of your association and as such are retained forever.)

TIPS & TOOLS for RUNNING YOUR PTA

Missing or minimal transitions are a common issue we hear when officers contact us who are having difficulties!

Help Your Successors by providing a Comprehensive Transition

The transition process is the responsibility of both incoming and outgoing officers and board members.

It gives closure to those leaving their positions and allows those coming in to be properly

Tax Support Center

e-learning

National PTA's
Training modules

PTA Publications:

*Running Your PTA...
Made Easy* booklet

Advocacy Leadership Guide

Leadership Essentials
Archives

Local Control Funding
Formula

Parents' Guide to Student
Success



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prepared. A good process of transition provides an opportunity for outgoing members to evaluate their work and efforts while giving suggestions to new board members on what they wish they had done differently.

Good transitions = Great Starts

Financial Officer Transition

Responsibilities before leaving office:

Who does the Annual Financial Report, Year-End Audit, and Taxes for 2015-2016?

The outgoing treasurer is responsible for both the Annual Financial Report - and can also complete the tax forms - and the outgoing auditor is responsible for conducting the Year-End audit.

ANNUAL FINANCIAL REPORTS

The **Annual Financial Report** is done at the end of the fiscal year - June 30 - and is a summary of income/gross receipts and all expenses/disbursements of the unit for the fiscal year (July 1 - June 30). Using your past "Treasurer's Reports", summarize all income/receipts and expenses/disbursements.

YEAR END AUDIT

The Annual Financial Report should be prepared prior to the audit and given to the auditor with your other treasurer records.

After the Audit Report (which includes the actual report form, the audit checklist and the recommendations/findings) are completed, both the Annual Financial Report and the year-end audit should be presented to the executive board and then to the general membership (at the first association meeting of the new year).

TAXES FOR 2015-16

The outgoing treasurer can complete the tax returns and then present them to the board. The taxes cannot be sent in until they have been reviewed by the executive board.

PLEASE NOTE: Updates about Electronic Tax Filing

- Beginning February 29, 2016, Form 990-N electronic submissions will be accepted through IRS.gov instead of Urban Institute's website. Aside from the submission site change, 990-N filers will be required to complete a short, one-time registration before submitting their electronic form to IRS.gov.
- Great News from the Attorney General, starting in March 2016 associations may file the RRF-1 online if gross receipts are under \$25,000.

Incoming boards: Get a head start now!

Board-elects can start planning and meeting in April, May, and June, to prepare before your term begins on July 1! Check out the following information to assist your PTA in getting organized now for next year.

Budget Process

Tools for New Leaders

Evaluating the PTA Term

Developing Your Leadership Skills

Strategies for filling PTA Boards

Building Volunteer Engagement

Presidents and Principals Working Together

Checklist-Start Your PTA Off Right

Twelve Things to Know or Do

Building Membership- ideas, timelines, etc

Working with School Leaders

Creating Procedure Books



PTA REFLECTIONS

"What is Your Story?"

is the 2016-17 Reflections theme.

If you are interested in starting Reflections at your school next year, please contact reflections@peraltadistrictpta.org

MEMBERSHIP



Membership envelopes

are \$15 for a box of 500 but they are not required; you can make your own or use a flier of your own design. Contact your council (if you are in a PTA council) or if you are an out of council PTA, contact

membership@peraltadistrictpta.org to arrange to purchase envelopes.

Membership cards for 2016-17

We will send out a message as soon as we know when we can expect membership cards for 2016-17. They are allocated based on your membership total this year. Stay tuned - electronic membership cards will also be available this year.

[Members Benefits from California State PTA](#)
[Members Benefits from National PTA](#)

RESOURCES

Provided previously in this newsletter:

"Crises Management and Maintaining Your PTA's Reputation"

is a new webinar from National PTA that was held on February 24, 2016.

National PTA webinars - recorded previously - can be found at <https://www.youtube.com/user/nationalpta>

National PTA's *Our Children* magazine

is no longer mailed to PTA presidents. It can be read online at <http://ptaourchildren.org/>

Do 1 Thing - <http://do1thing.com> -

is a website that provides "small steps toward being prepared for an emergency". Do 1 Thing is a 12-month program - including a **12 Month Preparedness Plan** - that makes it easy for you to prepare yourself, your family, and your community for emergencies or disasters. Fact sheets are available in multiple languages and you can sign up for monthly reminders on what to do each month.

The 2016 California Children's Report Card

has just been released, providing a close look at the current status of California kids. It assigns a letter grade ("A" through "F") to each of 31 areas key to children's well-being, including early learning, health and K-12 education, to help state leaders make informed policy choices and make kids our top priority.

Find the report from Children Now [here](#)

A video of a webinar on the new *Every Student Succeeds Act (ESSA)*

Video is now available and can be found [here](#)

It's a conversation on the implications for California of the federal Every Student Succeeds Act (ESSA), which was passed in December. The panel provided a diverse and insightful array of perspectives on how the new law might affect efforts to ensure that every child has an equal opportunity to succeed in school.

[PTA in California: Education Edition](#)

is filled with information on the new assessment score reports and is now available in Spanish, Chinese, Tagalog, and Vietnamese

<http://capta.org/resource/pta-in-california/>

[Sacramento Update: Advocacy News from California State PTA](#)

California State PTA supported 40 bills that were signed into law by the Governor in the 2015 legislative session

<http://capta.org/focus-areas/advocacy/sacramento-update/#Success%20for%20Several%20California%20State%20PTA-Supported%20Bill>

[What schools and Parents Need to Know about the New Vaccination Law](#)

an EdSource article <http://edsources.org/2015/what-schools-and-parents-need-to-know-about-the-new-vaccination-law/82242>

[Health Care and Immunizations](#)

<http://capta.org/focus-areas/health-safety/health-care-and-immunizations/>

[CAASPP-EAP Are You Ready for College?](#)

[CAASPP-EAP College Placement](#)

Ed100.org is a free online instructional course for parents who want to help improve their local schools. **[Flier about Ed100](#)**

[Low cost internet & computers from Comcast - www.internetessentials.com](#)

[Quick Guides to LCAPS](#) (Local Control and Accountability Plans)

[EdSource](#)

[E-learning modules from National PTA](#)

[Inside California Education](#)

[Special Needs Information from Common Sense Media](#)

Use the "Forward email" link below to share this newsletter!

or

use this link to sign up:

[http://visitor.r20.constantcontact.com/d.jsp?](http://visitor.r20.constantcontact.com/d.jsp?llr=hcm6t5cab&p=oi&m=1102686629959&sit=rgyp79neb&f=3faa0287-9e75-4d10-9183-2d980c04a40d)

[llr=hcm6t5cab&p=oi&m=1102686629959&sit=rgyp79neb&f=3faa0287-9e75-4d10-9183-2d980c04a40d](http://visitor.r20.constantcontact.com/d.jsp?llr=hcm6t5cab&p=oi&m=1102686629959&sit=rgyp79neb&f=3faa0287-9e75-4d10-9183-2d980c04a40d)