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Calendar

Please review and retain for reference our

2017-18 CALENDAR
&
PTA ANNUAL CHECKLIST

Remittances of \$



All membership remittances left over from last year submitted over the summer will be counted as memberships for 2017-2018.

Remittance forms can be found on the Peralta District PTA website.

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.

Attention

Peralta District PTA's AUGUST ASSOCIATION MEETING & TRAINING

Monday, August 28, 6:30 pm - 9:00 pm

Alameda County Office of Education, 313 West Winton Avenue, Hayward CA 94544

6:30pm to 6:45pm Check-in, networking and refreshments

6:45pm to 7:15pm Association Meeting

Budget & Program Approval

Audit Adoption

7:30pm to 9:00pm **WORKSHOPS: Membership, President, Reflections, Secretary, Treasurer/Financial Secretary, Revitalizar su Directiva (presented in Spanish)**

There is no cost to attend this training.

[Click here for the workshop registration form.](#)

Complete one form for each attendee, and return the form to rsvp@peraltdistrictpta.org by August 23, 2017.

-Thank you



Grant Program Proposal

In recent years, Peralta District PTA has offered a grant program designed to build and grow your PTAs. Up for approval by the association on August 28, we are proposing the following:

HEALTH/SAFETY PROGRAM GRANT

To encourage programs designed to improve the overall health and safety of children and youth, Peralta District PTA has established a Health/Safety Program Grant with individual grants awarded to a unit or council, of up to \$1,000 per grant.

PTAEZ GRANT

The purpose of these grants is to pay for one year of the PTAEZ accounting program for any unit which qualifies. Units are encouraged to begin the 45 day free trial period before applying.

COUNCIL PTA GRANT

These grants enable the council PTAs to better support programs that serve the units within the councils. This grant is not meant to cover organizational costs or recurring annual costs for the council or its board members.

LEADERSHIP GRANT for State Convention (April 27-29 in Ontario, CA)

Offered to PTA Leaders who expect to be officers/chairmen in 2018-19 and plan to attend convention; grants will be awarded as a reimbursement, after receipts are submitted with an expense report and convention evaluation.

Purvi Shah
2nd VP of Programs

District PTA Officers

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: Ujjwala Gadgil
Past President: Linda Dewlaney
1st VP-Leadership: *open*
2nd VP-Programs: Purvi Shah
3rd VP-Membership: *open*
4th VP-Communications:
 Liz Fischer
Treasurer: Aimee Hubacek
Financial Secretary:
 Vaish Gopal
Secretary: Alison Wiscombe
Historian:
 Paramita Bhattacharjee
Newsletter: Liz Fischer
Parliamentarian: *open*
Website: [webmaster](#)



The [2017-2018 National PTA Back-to-School Kit](#) is the first step in building your child's future. It contains resources to help PTA leaders serve their communities and manage local units, including

- Easy-to-use guides for the president, treasurer and membership and programs chairs
- Membership, fundraising and marketing tools
- Program and advocacy resources
- Special offers from national partners

As an additional resource, order "**Leadership Made Easy**" from California State PTA. It's that easy!

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: Page Tomblin
Berkeley: *open*
Fremont: Ivy Wu
Pleasanton: Robin Diaz

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
San Lorenzo

Resources & Links

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

2017-2018 MEMBERSHIP THEME



"Believe in Our Children, Believe in PTA"

Membership cards for 2017-2018 are in! Come to the August association meeting to pick up yours or

contact membership@peraltadistrictpta.org

to arrange for pick up if you are not part of a council. PTAs in Alameda, Berkeley, Fremont or Pleasanton should contact the membership chair and/or president of the council to arrange to pick up membership cards.

Build Your Membership in 2017-2018!

Getting Your Financials in Order

Your Unit's \$	NOT Your Unit's \$	Unit \$ Given Away
<p><u>Audit</u> twice a year per your bylaws. Have the audit(s) approved by the executive board first followed by association adoption.</p>	<p><u>Per caps</u> should be called out in every financial report as both "Income Not Belonging to the Unit" for all memberships received and "Expenses Not Belonging to the Unit" for per caps remitted to council (if in council) or district.</p>	<p>Accompany money given to a school site with a <u>Fiduciary Agreement</u>.</p>
<p>Have you completed your <u>Annual Financial Report (example)</u>? Out-of-council units please send these to <u>financialreports@peraltadistrictpta.org</u> or mail to Aimee Hubacek, Treasurer</p>	<p>Funds from other groups (student body, sports teams, teachers) should not be deposited in PTA bank accounts (called <u>commingling of funds</u>)</p>	<p>Units who are not in good standing lose their charter and hand over their funds to the district PTA.</p>

Services:

[e-Bylaws](#)

[PTAEZ](#)

[PTA Merchandise Store](#)

[Tax Support Center](#)

[e-learning](#)

National PTA's Training modules

PTA Publications:

[Running Your PTA... Made Easy](#)

[Social Media Advocacy Guide](#)

[Leadership Essentials Archive](#)

[Local Control Funding Formula](#)

[Parents' Guide to Student Success](#)



Follow us on [Facebook!](#)

Amiee Hubbard, Treasurer
67 Amok Way
Fremont, CA 94539

Government forms will ask for your gross income (or [gross receipts](#)). Your gross income is everything minus per caps (see *NOT Your Unit's \$*).



[Spend](#) to benefit as many students as possible. Avoid [personal gifts](#). Plan to NOT grow your bank account year after year.

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)