

Dates to Remember

October 1st

Final Turn-In for "Ready Set Remit" State PTA membership awards Per Caps (minimum 30 members) received by mail to Fremont financial secretary

October 10th Council Meeting - Executive Board meeting [7:00 pm]

The following are due at this meeting:

- Per caps received since last council mtg
- If not previously submitted:
 - Remittance of a minimum 15 per caps to remain in good standing with the State PTA
 - Audit for period ending June 30, 2011
 - Board Roster 2011-2012
 - Annual Financial Report 2011-2012
 - 2011-2012 Budget
 - Calendar of your PTA events
 - Mission statement and goals

October 25th

Council eNewsletter deadline – email Julie Hale

November 14th

Reflections entries due, Irvington High School Library, 5:30-8:30pm (*entries will not be accepted at Fremont Council meeting later this same night*)

November 14th Council Meeting - Executive Board meeting [7:00 pm]

The following are due at this meeting:

- \$199 Insurance Premium and *Worker's Compensation Annual Payroll Report* for units with less than \$1,000 in contractor payments (required for all units even if you have 0 employees)
- Copy of filed tax return
- Per caps received since last council meeting

November 15th

Due to the IRS: paper informational tax returns 990/990EZ and Schedule A or e-postcard return 990-N. **ALL PTA UNITS, COUNCILS AND DISTRICTS WILL FILE TAX RETURNS.** (See [Finances](#) section for details.)

November 21st

Last day to submit \$199 Insurance checks to Fremont Council fin sec (Pay \$224 after this date)

November 21 - 22

Reflections Judging, TBD

Fremont Council Mission Statement

Our Mission is to advocate for all the children and youth of Fremont Unified School District. Fremont Council PTA will support each of our PTA/PTSA units through timely communication, training, leadership, and guidance. We will assist units through disseminating information, conducting meaningful meetings, providing PTA resources, and being a platform for sharing ideas and programs between units. Fremont Council PTA will serve our community through education, collaboration, resource services, and community wide programs.

2011/12 Goals

1. Improve communication from council to units
2. Increase skills/knowledge through training
3. Create opportunities for collaboration amongst units

IMPORTANT! New Tax Requirements
 Please review this link ASAP for more info:
<http://www.capta.org/sections/finance/tax-requirements.cfm>

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Council Officers and Chairs 2011 – 2012

Feel free to contact any of the Fremont Council Executive Board for information, assistance and/or support.

President	Melinda Kufeld	melinda.kufeld@sbcglobal.net	(510) 468-0780
1st VP Leadership	Meryl Shatzman	merylshatzman@yahoo.com	(510) 697-7656
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Treasurer	Kim Mathis	oemexp@att.net	(510) 770-1297
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Auditor	Sridevi Ganti	sridevi_ganti@hotmail.com	(510) 364-2493
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Legislation Chair	Ann Crosbie	crosbieclan@gmail.com	(510) 713-2119
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Fremont Council President's Message by Melinda Kufeld

One month down, 8-1/2 to go. Before we know it, the school year will be over and you'll be well on your way to being a PTA pro. I know, you have a hard time believing that could possibly be true, but it is our goal as Fremont Council PTA to help you develop your PTA knowledge and skills so that you become confident in your role as a PTA leader.

You've read your bylaws, made copies for your executive board and reviewed them so your leadership team has understands how your unit is to conduct the business of your PTA. Haven't gotten out your bylaws? Make it a priority to do so within the week! Can't find a copy? Contact Fremont Council PTA parliamentarian Lisa Ogrey at logrey@pacbell.net so she can get a copy to you.

You've begun to read and consult the long awaited CA State PTA toolkit. As you continue to do so, share what you learn with your executive board. Although we waited for the hardcopy of the toolkit, I prefer to use the PDF version you can download from the CA State PTA website, <http://www.capta.org/sections/resources/toolkit.cfm>. The handy search feature makes it easier to find what you're looking for plus you can email pages or sections to your board and chairpersons.

You've read the 2011 Insurance Loss Prevention Guide and consulted the green, yellow and red pages to ensure all aspects of your PTA programs and events are compliant with our PTA insurance policy. If your predecessor didn't pass on the 2011 Insurance Loss Prevention Guide, download it at <http://www.bbt-knight.com/pta/>. Username: PTA, password: Member.

You've checked out the wealth of quick and easy to read information Meryl, VP of leadership, has posted to the Fremont Council Website, <http://www.fremontcouncilpta.org/leadership>. Pass on what you read so others can become future leaders at your PTA.

You've read the Fremont Council PTA eNewsletter for a collection of information and upcoming events. Did you read something, but can't remember the details? Read current and past eNewsletters at <http://www.fremontcouncilpta.org/newsletter>. Plus subscribe to Peralta District, CA State and National PTA communications.

You've attended the recent training provided by Peralta District PTA. Not only did you attend, but you encouraged others to do the same. More than one-third of those who attended training were from Fremont PTAs. Thank you to **ALL** who took the time to grow as PTA leaders! Look for future training opportunities to include the CA State PTA convention in May.

You've received a crash course in the basics of PTA and learned how Fremont Council PTA exists to support you when you joined us for the September Fremont Council PTA meeting. Many of you have reached out to various council officers and chairpersons for guidance. Please continue to do so! AND continue to attend the monthly council meetings! Invite members of your executive board to join you.

(continued on next page)

(President's Message continued from previous page)

Can't make it one month? Have someone come in your place. Look ahead to what paperwork is due and be ready without scrambling to get it together. Not sure what's due when? Check out the full calendar at <http://www.fremontcouncilpta.org/calendar>.

The more you and others in your PTA know, the easier your "job" as a PTA leader will be and the stronger your PTA will become. **For those who have begun the learning process, congratulations and keep it up!** For those who haven't, it is time to begin.

Overwhelmed and don't know where to start? Simply reach out to any of us, we are here for you.

Have a great month! We look forward to seeing you on October 10th!

Melinda

From the Membership desk..... by Beena Ammanath

10 Steps to Membership Success



1. Make it Personal: ask Friends and Family.

Their membership supports the voice for your child and all children nationwide. Don't be shy. Ask, ask, ask!

2. It's a Year Long Event!

Keep PTA envelopes in the front office in a convenient, accessible place and have them available at school events all year. Remember that new students enroll throughout the year.

3. It's a Group Effort.

Form a committee that will carry your school's membership message so you have a broader opportunity for outreach in your school and community. Create new ways to spread your membership message throughout the year.

4. Distribute Cards.

Find a variety of ways to get cards into your members' hands. This is a requirement that can benefit your members and assist in accountability. Create awards and or discounts for card carriers on your campus and in your community.

5. Count Your Students In.

Students are valuable resources as members and can take on an active role on your board. The potential contributions on your campus are endless!

6. Teachers are the "T" in PTA.

Take the time to focus on bringing teachers on board as active members with input. Engage them as critical components of your school programs.

7. Community Supporters.

Give local businesses a chance to show their support for children and education. Adopt a business, or simply reach out and invite them to join with a big thank you that they can display in their business.

8. Kindergarten parents...the future leadership for an elementary school PTA.

Attend the kindergarten round-up, ask for a minute on the agenda, and invite these new and enthusiastic parents to get involved! Be sure to suggest ways that they can help.

9. Invite school district leaders and school board members to trumpet the importance of PTA membership.

Their affiliation with PTAs in your community is mutually beneficial. Encourage them to share in public meetings the many reasons why PTA and parent involvement contribute to student success.

10. I joined PTA...did you?

That old-fashioned button we used to wear still echoes a compelling question. Consider wearing it at Back to School night and other school events and functions!

From the Auditor by Sridevi Ganti

- Please turn in 2 copies of 2010-11 year end audit report at October 10th Council meeting.
- The link below is a "new" audit checklist. Please use the new checklist for the reports.

<http://www.peraltadistrictpta.org/pdfs/AuditChecklist.pdf>





CHECKLIST FOR A HEALTHY PTA UNIT

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?

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?

Bylaws

- Are bylaws reviewed yearly and updated (sent through channels for approval) every 3 years?

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?
- Are tax filings submitted in a timely manner?

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 they presented at both executive board and association meetings?

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?

Annual Reports

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

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?





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Finance Corner

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\$ TAXES \$ INFORMATIONAL MEETING

Treasurers Get Together
Review **NEW TAX REQUIREMENTS**
Saturday 10/8/11 <> 4 - 6 p.m.

NEW Requirements for Taxes
11/15 Deadline is coming



Don't forget to submit to Council:

- Two copies of your annual financial report of 2010-2011
- Two copies of your end-of-year audit – June, 30, 2011
- Two copies of your preliminary or approved budget for 2011-2012

Also:

- Two copies of board roster 2011-2012
- Calendar of PTA events
- Mission statement and goals

What's NEW?

- (1) All PTA/PTSAs must file a **California** return by 11/15/11 (in addition to a Federal return)
- (2) All Units need a Charitable Trust (CT) # >Make application CA Attorney General **ASAP**
- (3) **RRF-1** mandatory starting in 2012. Need your CT # to file.

Why it's important:

Must file tax returns to maintain tax-exempt status.

Come and hear what's involved from our local PTA Treasurer Procedures guru, Nancy Mitchell. (Overview of e-filings only. Consult your accountant or tax advisor for assistance with other forms)

To make the most of the event, please bring as many of the following items as possible:

- 1) 10/11 Annual Financial Report
- 2) Current Bylaws
- 3) Unit PTA important ID #s
- 4) 990-N e-file password

Please come and meet your fellow treasurers in a casual environment. We promise to make it as fun and painless as possible. (Please send someone from your unit if the Treasurer cannot make it and you haven't completed these three new items.)

Location:

44619 Parkmeadow Drive, 94539

RSVP to Kim Mathis: 770-1297, oemexp@att.net (Council Treasurer)

Resources!

If you were not able to attend District Training, remember there are lots of resources you can access online.

www.FremontCouncilPTA.org - Finance

www.capta.org/sections/finance/tax-requirements.cfm - Tax requirements spelled out

2011 Toolkit - Finance section can be found on www.capta.org.

Make it a great year!

Kim Mathis – Treasurer

oemexp@att.net

(510) 770-1297

Barbara Bousquet – Financial Secretary

h20swimbarb@gmail.com

(510) 557-7640

Sridevi Ganti – Auditor

sridevi_ganti@hotmail.com

(510) 557-7640





Reflections Art Program by Becky Bruno

2011-2012 Theme: "Diversity means"



I need to receive Reflections chair contact information for each unit. Please email the following information to Becky Bruno, bbruno4921@gmail.com, ASAP!

School:

Chair Name:

Phone:

Email:

(indicate if chairperson is familiar with Reflections or if 1st time)

Reflection entry form is on website:

<http://www.fremontcouncilpta.org/system/files/downloads/ReflectionsSubmissionTEMPLATE.xls>



Dates

Submissions due to Fremont Council: Nov. 14 at Irvington HS

Judging: Nov. 21&22 - *please help recruit qualified judges*

Recognition Ceremony in December (date to be determined, will be on a Saturday early in the month)



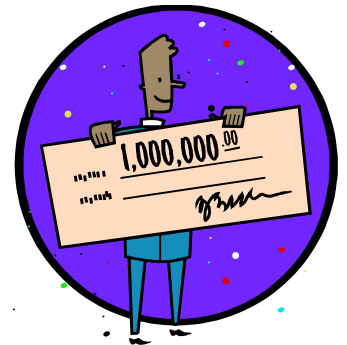
GRANT INFORMATION

PTA's Scholarships and Grants make it easy!

California State PTA wants to help you attain your school goals, whether it's for an individual or a campus, we might have what you need! They are obtainable to units, councils, districts and members. Take a look at what's available and talk to your local leaders or go to California State PTA website at www.capta.org for more information:

Applications due November 15:

- Scholarships for Continuing Education for PTA Volunteers
- Scholarships for Continuing Education for Credentialed Teachers and Counselors
- Scholarships for Continuing Education for School Nurses
- Grant for Parent Education for Unit, Council and District PTAs
- Grant for Outreach and Translation for Unit, Council and District PTAs
- Grant for Healthy Lifestyles for Unit, Council and District PTAs
- Grant for Cultural Arts for Unit, Council and District PTAs



When submitting scholarship or grant applications, please note that applications are due in the California State PTA office via US mail on or before the application due dates. Facsimiles will not be accepted.

The California State PTA Scholarship and Grant Program is funded through Honorary Service Award donations. Please remember that when you honor someone with an HSA Award you are also helping to fund a scholarship or grant!

For an application and details, visit the Forms section in the Toolkit, available on the California State PTA website at www.capta.org.



The Leader Link by Meryl Shatzman



Stop the Drama

Sometimes it seems like drama is the norm rather than the exception for many PTA's. There is almost no way for involvement to grow and community to flourish in that kind of atmosphere. As a leader, one of your most basic goals has to be reducing or avoiding drama. There are many reasons why drama seems to find its way so easily into PTA. It starts with the passion that many of us bring to any endeavor involving our kids and the different personalities and perspectives we bring to any situation. Additionally, schools bring together a cross section of society, with many different viewpoints on the role of PTA and how the group should operate. I bet you've wished once or twice that you could fire a volunteer. But you can't, and thus drama tends to fester. The squeaky wheel not only gets grease, she may also chase away better volunteers in the process. But drama isn't just about the occasional unreasonable volunteer. Even among excellent volunteers, the unintended slight, the change in last year's process, the misunderstood email—they're the kindling of acrimony. All of these things, if allowed to boil, can become fuel for drama. How you handle them will determine the atmosphere of your group.

So what's the drama-avoiding PTA leader to do? How can you help your group mature? How can you make your group a place where adult manners and adult habits win? It starts with open communication. When you sense hurt feelings or a murmur of discontent, address it openly right away—not in a gossipy way, but as the adult. "I've heard some questions about this issue, and I wanted to clarify my thoughts and get your feedback" is a disarming approach whether it's used in a one-on-one email or in front of your whole group or committee. We hear buzz about perceived and real misdeeds all the time. Have you tried sitting down and having a calm, adult conversation about your concerns? That simple first step, which is an excellent way to defuse drama, is often skipped. Self-deprecating humor can also go a long way before, during, and after conflicts. You're not in this to win arguments and you're certainly not perfect; don't be afraid to mention both of these early on. The latter will become clear eventually, so you might as well get ahead of it. Distributing credit and taking blame will go further in soothing others. Thank and praise widely and publicly. When feelings are hurt, apologize rather than explain why feelings shouldn't have been hurt. That keeps others from turning away. Defensiveness begets drama.

Quit being so nice!

All that being said, sometimes I do wish PTA's were a little less nice. Most groups have a well-intentioned desire to hurt no one's feelings. A good meeting is one that ends early with no conflict or differences of opinion. If differences do arise, every effort is made to resolve those differences so everyone leaves happy. One passionate opponent can trump a dozen or so folks who believe a decision should go a different way. In an effort not to offend anyone, nearly everyone winds up with a less effective group. Well, that is a recipe for mediocrity. PTA's are run by consensus, but too often consensus has morphed into "What decision will cause the least angst?" The problem is that almost all change worth making involves kicking up dust. And almost all change worth making is going to rankle one or more of the folks at your school. A parent will complain. Some teachers will object. A longtime volunteer or two will wonder what was wrong with the old way. If your group only moves when you have near unanimous consensus, then is it any wonder that things don't change very often or that you don't seem to make as much progress as you wish each year? Heck, it's almost impossible to get 10 adults to unanimously agree on pizza toppings, never mind the direction of your parent group.

As a leader, you have to expect objections. The key is not to take objections as insurmountable roadblocks. Don't fold. Don't give up. Lead. It's your job as leaders to see that good change does happen, even if the process of getting there is difficult. We have to actively build support for good initiatives. We have to be willing to take the slings and arrows that come with leading change because we know that the particular change is best in the long run. That's not to say that PTA Presidents should become dictators. Your group is not your fiefdom to do with as you please. But neither does it need to be an organization where never is heard an argumentative word.

(continued on next page)

(The Leader Link Continued from previous page)

Those discussions might lead to being confronted with criticism, but unfortunately it's inevitable when you take on a leadership role. Criticism has two elements: fact and emotion. A standoff laced with emotion will do much more harm than good. Emotions tend to make people express themselves more strongly than they really mean. A disagreement becomes a dispute, and opinions are drawn in terms of black and white. In this situation, only two answers are possible: right or wrong. Others are forced to choose sides. On the other hand, a rational discussion might help you evaluate the situation and make better decisions in the future. Your job as a leader is to take emotion out of the discussion as much as possible and get down to the nuts and bolts.

Yes it's hard not to feel personally attacked after you have devoted so much of yourself to the group. Share your frustration with a (non-PTA) friend over coffee, but keep a stiff upper lip and an open ear when you're in your role as President. Always try to look at situations from the other side. You might discover that things look different from another perspective. It takes strength to admit when you're wrong, but doing so will be better for you and the whole group in the long run. When you are personally confronted with criticism or complaints, handle the situation with a face-to-face conversation. It might be easier to send an email or leave a message, but that won't address the issue. Muster the courage to talk to the complainer directly. Explain your position, come to a compromise, or agree to disagree, depending on the situation. As always, it all begins and ends with solid communication.

Parliamentarian Corner by Lisa Ogrey

Welcome to a new year of parliamentary procedures. As your Council Parliamentarian I hope to serve as your resource and to provide assistance as you review and update your bylaws. As the year progresses I will be emailing out information to your unit Parliamentarians, reminding those that have overdue or nearly due bylaws on the importance of submitting these before they are severely delinquent. My main goal is to help you remain in "good standing".

I will also give you guidance and educate those that are unclear on the process of gathering a nominating committee, your election procedures leading up to your annual meetings, and what is needed to have a successful election.

If you have any questions please don't hesitate to contact me at logrey@pacbell.net

I look forward to working closely with all of you!

Lisa Ogrey

Fremont Council PTA Parliamentarian

I sent out an email on the yahoo group that details the process for renewing your unit bylaws. Peralta District has put together a great guide to help your unit Parliamentarian review and update your unit bylaws which includes update processes and building EBylaws online. Follow the link below to access this guide and other information needed.

Remember that Unit Bylaws must be renewed every 3 years. They can only be submitted for state approval after being reviewed and any changes approved by your executive board. The association will need to adopt the state approved bylaws once they are returned to you. Only after the association approved the bylaws, do they go into effect. If your unit wants to increase membership dues for next school year's membership drive to cover this year's \$.50 increase, now would be a good time.

<http://groups.yahoo.com/group/fremontcouncilpta/message/3195>