

**Dates to Remember**

**May 9<sup>th</sup>-12<sup>th</sup> California State PTA Convention, Anaheim, CA**

**May 15<sup>th</sup> RSVP for Awards/Installation**

**May 21<sup>st</sup> Council Meeting – Awards and Installation [7:00 pm] FUSD Board Rm**

The following are due at this meeting:

- Two copies of the Unit Annual Report (if not previously submitted)
- Two copies of the 2012-2013 Board Roster (if not previously submitted)
- Per caps received since last council meeting

**May 25<sup>th</sup> Registration due for June Training by Peralta District**

**June 2<sup>nd</sup> Peralta District Training in Castro Valley [8:15 am – 2:15 pm]**

**June 11<sup>th</sup> Council Meeting – Exec Board Meeting [7:00 pm]**

The following are due at this meeting:

- Two copies of the Unit Annual Report (if not previously submitted)
- Two copies of the 2012-2013 Board Roster (if not previously submitted)
- Per caps received since last council meeting

**June 21<sup>st</sup> – 24<sup>th</sup> National PTA Convention, San Jose, CA**



**Fremont Council President’s Message by Melinda Kufeld**

Can you believe it’s already May? I find it hard to believe that the school and PTA year has gone by so quickly, but when I look at my Unit Reports and Checklists Binder and see that it’s a bit fuller each day it serves as a confirmation that it is indeed May. Thank you to the Fremont PTAs that have submitted the Annual Unit Historian Report required by CA State PTA and the council supplement report and checklist! I love reading about all of your accomplishments, the wonderful PTA programs and events, and innovative ways Fremont PTAs are serving their school communities. Great job! You’ve made a difference in the lives of young people throughout Fremont, exposing them to new experiences and enriching their childhood. I look forward to reading the rest once I receive them – hopefully very soon!

We’re going to compile a booklet of some of the outstanding and innovative Fremont PTA programs to distribute at the May 21<sup>st</sup> council meeting, the annual Awards and Installation event. During the event on the 21<sup>st</sup>, presidents will be asked to share information about these programs with you. Make sure you invite your current and board elect plus your principal as you won’t want to miss this wonderful opportunity to get new ideas for your school and PTA! Plan time soon after to discuss which ones may be good additions and how to make them a part of your 2012-13 school year plans.

(Continued on page 2)

**Inside This Issue:**

What’s due this month	1
President’s Message	1-2
Contact Information	2
Teacher Appreciation	2
The Leader Link	3-4
Membership	4
New PTA Insurance Information	5
Paperwork Needed!	5
Auditor	6
Reflections	6
Mission Statement and Goals	6
Parliamentarian Corner	7
Finance	7
Good Transitions = Great Starts	8-9
Peralta District Training	10-12
Awards & Installation	13

Please take a look at the Peralta District PTA Newscaster. There is a ton of great info included.

<http://www.peraltadistrictpta.org/newsletters.php>

## 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	<a href="mailto:melinda.kufeld@sbcglobal.net">melinda.kufeld@sbcglobal.net</a>	(510) 468-0780
1st VP Leadership	Meryl Shatzman	<a href="mailto:merylshatzman@yahoo.com">merylshatzman@yahoo.com</a>	(510) 697-7656
2nd VP Programs	OPEN		
Secretary	Nancy Mitchell	<a href="mailto:nancym@mac.com">nancym@mac.com</a>	(510) 657-2912
Treasurer	Kim Mathis	<a href="mailto:oemexp@att.net">oemexp@att.net</a>	(510) 770-1297
Financial Secretary	Barbara Bousquet	<a href="mailto:h20swimbarb@gmail.com">h20swimbarb@gmail.com</a>	(510) 557-7640
Auditor	Sridevi Ganti	<a href="mailto:sridevi_ganti@hotmail.com">sridevi_ganti@hotmail.com</a>	(510) 742-1936
Historian	Cindy Baglietto		(510) 484-4031
Parliamentarian	Lisa Ogrey	<a href="mailto:logrey@pacbell.net">logrey@pacbell.net</a>	(510) 713-8542
Legislation Chair	Ann Crosbie	<a href="mailto:crosbieclan@gmail.com">crosbieclan@gmail.com</a>	(510) 713-2119
Reflections	Becky Bruno	<a href="mailto:bbruno4921@gmail.com">bbruno4921@gmail.com</a>	(510) 661-0117
Membership	Beena Ammanath	<a href="mailto:neilseansmom@gmail.com">neilseansmom@gmail.com</a>	(415) 238-6123
Newsletter Editor	Julie Hale	<a href="mailto:penguinfantoo@comcast.net">penguinfantoo@comcast.net</a>	(510) 494-0706
School Board Liaison	OPEN		
Diversity	OPEN		
Hospitality	Leslie Gupta	<a href="mailto:lk Gupta@comcast.net">lk Gupta@comcast.net</a>	(510) 818-9551
Robertson's Liaison	Aimee Hubacek	<a href="mailto:Hubacek6@comcast.net">Hubacek6@comcast.net</a>	(510) 656-1261
Health & Safety	Dianne Jones	<a href="mailto:robndianne@sbcglobal.net">robndianne@sbcglobal.net</a>	(510) 713-9391
Webmaster	Jenny Mitchell	<a href="mailto:jenstechs@mac.com">jenstechs@mac.com</a>	

(President's Message continued from previous page)

Our goal is to collect fliers/planning documents/etc to post so other Fremont PTAs can model programs and events at their schools. We'll let you know where this information will be posted and when it will be available. I'm excited to be able to provide such a helpful resource for our PTAs. Stay tuned for further details...

The transition period has begun, a critical time in the PTA year that often defines the success of the coming school year. The months following the annual election should include a combination of reflection upon this year to evaluate your PTA's programs and events plus discussion on how your PTA can best serve your school community next school year. This is the time to collect files and materials to pass on to successors, meet to transition from current to new positions, and attend training in preparation for new PTA roles. Make it a priority that new officers plus Reflections and membership chairs are properly trained. The cost and time devoted to attend training are incredibly small compared to the individual and collective benefits of knowing what your role consists of, how to perform it, and where to turn for assistance. Additionally, have available items such as binders/dividers, folders, and jump drives to assist in the passing of files and materials.

If your current budget does not include training, modify it. Make sure training is included as you begin to develop your 2012-13 budget. The CA State PTA convention will be held in San Jose next May! Include funding to take advantage of this opportunity by having at least one person from your PTA attend the convention next May. Other items to include in your budget that you may not have this year? Sadly Founders Day is often overlooked. It is a wonderful way for your PTA to recognize those special people in your school community and to send them to the council Founders Day celebration.

I look forward to seeing you at the Awards and Installation event and meeting incoming presidents as we celebrate the many accomplishments of our Fremont PTAs! RSVP to Meryl by May 15, sign up for June 2 training, begin to plan for next year – all steps towards successfully wrapping up the 2011-12 PTA year and the beginnings of a significant 2012-13 school year!

Best wishes, Melinda | [melinda.kufeld@sbcglobal.net](mailto:melinda.kufeld@sbcglobal.net) | (510) 468-0780

### ***Teacher & Staff Appreciation Week is May 7-11***

Just a reminder that PTA resources may be used for hospitality for staff appreciation as long as it does not represent a significant amount. "Not of a significant amount" is defined by the IRS as an amount that **does not exceed 5 percent** of a nonprofit organization's annual **budget**. PTA funds cannot be used to purchase personal gifts for staff or volunteers, such as gift cards. Showing some staff appreciation is important to building a strong home-to-school connection, so events like an Appreciation Luncheon is an acceptable expense, as long as the expenses stay in the guidelines.



### Is Your PTA an ATM for Your School?

Have you ever felt that your PTA was an ATM for your school principal and teachers? Have you ever felt like your Principal thought your PTA budget was his/her discretionary spending fund? Do you get requests from teachers and staff to fund certain projects and items that really ought to be part of the school budget?

You're not alone. PTAs frequently turn over their funds to school administrators for such basics as books, equipment and maintenance, not to mention extras, such as playground equipment and vending machines. In these years of dire educational funding cuts, more and more schools are depending on PTAs to cover these types of expenses. Therefore the customs that have developed between PTAs and schools have blurred the lines about what PTAs are; what vision, mission and purposes we follow; and how our funds should be used.

**Remember who we are!** The primary purpose of the PTA is not to raise money; the mission of the PTA is threefold; 1) To be a powerful voice for all children, 2) To be a relevant resource for families and communities, and 3) to be a strong advocate for the education and well-being of every child. **Remember that PTA doesn't work for the school – it works on behalf of children and families.** Families should never feel that their input is only valued because of the checks they can write the PTA or the school.

PTAs are not an additional funding resource for goods, services, and payroll for public schools. School funds should be supplied by governmental entities. PTAs advocate for the adequate funding of schools from government sources – such as with the Our Children, Our Future Education Initiative. They do not replace funds not supplied by governments. PTA fundraising specifically to backfill lost funding at their school impacts equity in our schools; the base funding should be equitable for every school in the district, not dependent on how much the PTA raises from year to year.

PTA funds raised by PTA members belong exclusively to that PTA organization and can only be used for purposes approved by its members through the budgetary and amending process. Approved uses of funds should be in line with the mission and goals of that PTA as a whole. One year's budget and board cannot encumber a future year's board. So, just because your PTA provided the school funds for certain expenses in the past, it does not guarantee that they would provide it in the future. A new set of goals and related budget proposals are made anew at the beginning of each year and must be approved each year. If you are not spending a minimum of 50% of your budget for programs that directly face children and/or families, you should re-evaluate your goals.

### PTA Funds vs. School Funds

School funds or funds belonging to outside groups cannot be commingled with PTA funds in any way. A PTA cannot deposit funds that are not theirs. This is called commingling of funds and it is illegal. For tax reporting and filing purposes, the IRS considers all monies deposited to the PTA account as that PTA's gross receipts, excluding funds forwarded through channels (e.g., per capita dues). To comply with all requirements, regulations and laws, a PTA must handle only those funds over which it has full control. All PTA monies and other assets are the property of the unit and should be administered through its own accounts. If a PTA sponsors a project or program in cooperation with the school, all funds need to be accounted for and separated prior to the immediate deposit of the PTA portion into the PTA bank account. All funds deposited in the PTA account become the property of the PTA, and all expenditures require a vote of the association.

### **A PTA SHOULD NOT**

- Deposit funds from other groups or organizations in the PTA account;
- Deposit PTA funds in a personal account; or
- Deposit PTA funds in school or school district accounts.
- Pay bills handed over by the principal. If the school ordered it, the school pays for it, unless your association has approved of this request.

(Continued on page 4)

(The Leader Link continued from previous page)

### **Paying for Large, Multi-Year Items**

Before approving spending proposals for large, material aid to the school, such as marquees, playground equipment or computers, a PTA should consider whether or not the proposed equipment or services is a public responsibility. If other options have been exhausted, and your association votes to approve the commitment, you may designate funds for this purpose. Since these large purchases are usually a multi-year project, the funds should be designated for the specific purpose in your minutes and as a separate budget line when you carry them over to the next year. There is no time limit on how many years' funds can be carried-forward, as long as the association approves raising the funds for the purchase each year. However, if the future PTA board does not vote to continue raising money for the project, and the school or other group is also paying a portion and continuing on, the specially-designated funds already raised must then be gifted to the school for partial payment of the activity.

### **Gifts to School/Grants**

Many Fremont PTA's offer Teachers a stipend to purchase classroom supplies such as art paper or books. Develop a list of approved purchases that will benefit all children in the classroom – supplies purchased using PTA funds should be going to the children (paper, pencils) not to the teacher (their desk accessories). Do not give money up-front and always require receipts in order to reimburse the teacher.

If teachers are paid for academic enrichment programs by PTA (sending them to a workshop, etc), then Workers' Compensation requirements need to be paid. Anytime any person is paid money by the PTA, a Workers' Compensation Form must be filled out. It would be best to give that money to the school district to administer the program. If a teacher is paid more than \$600 in a calendar year, a Form 1099-MISC must be filed with the IRS.

## **Membership by Beena Ammanath**



Congratulations to all the units that have ALREADY exceeded last year's membership numbers!  
Keep up the good work! And keep those remittances coming in right until June 30<sup>th</sup> of this year!

Remember: the membership year is not over until the end of June. We still have May and June to collect up those per capita remittances and forward them on through channels. It would be great if every unit could meet or exceed their membership totals from last year!

This is a great time to compare last year's membership list to this year's. Who didn't join your unit this year? Send a letter to those who didn't join. Tell them you value their membership and want them to join again this year.

If you have a new membership leader at your PTA, reach out and make sure you hand over and help plan for next year's membership activities.

Need additional resources? Check National PTA web site ([www.pta.org](http://www.pta.org)), California PTA website ([www.capta.org](http://www.capta.org)), Peralta District PTA ([www.peraltadistrictpta.org](http://www.peraltadistrictpta.org)) or Fremont Council PTA ([www.fremontcouncilpta.org](http://www.fremontcouncilpta.org)) for a wealth of information on planning your membership year.

*As always, feel free to reach out to me, if you have any membership related questions!*

## New Username for Insurance and Loss Prevention Guide Site

As you plan 2012-13 PTA events and programs you **MUST** refer to the Loss and Prevention Guide, even for programs and events your PTA has done for years and years and years. This guide, which is constantly being updated, was mailed to all presidents in November. It is also available on line at [www.pta.bbt-knight.com](http://www.pta.bbt-knight.com).

**NEW** username: ptausers  
password: member

Consult the green, yellow and red pages to ensure you are covered by insurance for each of your programs and events. Items on the yellow pages are usually approved once the required action is taken. Note that walk/jog-a-thons are listed on the yellow page and required action to include securing a waiver for each participant must be taken to ensure insurance coverage if needed. Read the guide for all stipulations for each item listed on the yellow pages.

Items found on the green and red pages are pretty obvious – green is good to go, red is stop and don't proceed! *Your PTA is in jeopardy of not being covered by our insurance and officers personally liable if a claim is submitted against anything listed on the red page.* Do not put your PTA or officers at risk! Consult the Insurance and Loss Prevention Guide and don't hesitate to contact BB&T - Insurance Services of CA, Inc. who provides insurance for CA PTAs.

Email address: [capta@bbandt.com](mailto:capta@bbandt.com)

Phone: (800) 733-3036

### Oh No! Dreaded Paperwork!

To be able to continue as a PTA there are some tasks we need to do - no one likes doing them, but it is what's required, and in some cases, it's actually the LAW. So if you've yet to submit any of the following and want to continue to pay the lower on-time rate of \$200 annually for insurance, get going on these tasks **NOW!**

2012-13 Roster – *due immediately*

Annual Unit Historian Report – *due immediately*

Fremont Council Year End Supplement Report – *due immediately*

Fremont Council Year End Checklist – *due immediately*

Charitable Trust # application – *need for November, 100 day waiting list, time's a ticking*

Bylaws signed by CA State PTA more than 3 years ago – *needed to apply for a CT#, see above*

2010-11 Year End Audit – was due at the Sept 2011 meeting

Mid Year Audit – was due in February

Mid Year Unit Report – was due in February

Mid Year Checklist – was due in February

***THESE ITEMS NEED TO BE A PRIORITY!!*** We are all busy, many of us work, some of us have family issues and very few of us like to "do paperwork." Regardless of which bucket(s) you fall into, these tasks need to be completed. But they do not necessarily need to be completed by you. Delegate. Ask your VP or secretary to put together the unit reports, checklist and roster. Don't have an auditor? Ask via your Yahoo Group, Email Blast, etc if there is a person in your school community who works in the accounting field or is good with details and numbers. If not, contact council auditor Sridevi Ganti. There are plenty of resources at council. We are here to assist and have offered all year to lend a hand.



## From Council Auditor- Sridevi Ganti

Thank you to the units that have submitted the midyear audit reports (July 1, 2011-December 31, 2011). If you have not submitted it yet, it is not too late. Please contact me ([sridevi\\_ganti@hotmail.com](mailto:sridevi_ganti@hotmail.com)) for assistance.



**Also, I recommend the incoming and outgoing auditors to attend June 2nd officers training.**

I would like to remind you that whether you are the continuing officer or not, the books must be audited prior to the start of next school year. An outgoing auditor must audit books before they are passed on to the incoming treasurer. Here are some steps to prepare for the end of the year audit (January 1, 2012 – June 30, 2012) in July.

1. Present Treasurer's report at all monthly meetings
2. All checks written between association meetings must be ratified. This includes association and executive board meetings. Bills presented at meetings are approved and then written. Approval is for checks written at the meetings. Ratification is for checks written between meetings.
3. All checks and deposits (including e deposits like e scrip) must be entered to arrive at monthly checkbook totals.
4. Checkbook monthly balance must match Treasurer's report balance and the reconciled bank statement balance. If the treasurer's report does not cover a calendar month, then, the bank statement should be reconciled with the ledger.
5. Reconcile the bank statements monthly.
6. All deposits and reimbursement forms must be supported by proper documentation (receipts, invoices etc). All checks must have 2 signatures.
7. Cash verification form must be used for deposits and must have all the signatures.
8. Treasurer's report, membership report (up-to-date membership) and any other committee report (fundraising, health and safety etc) must be included in association meeting minutes.
9. Treasurer's binder must include current bylaws, board roster, calendar, adopted budget, association meeting minutes, executive board minutes. Committee reports. monthly bank statements. monthly treasurer reports. last audit report. and copy of taxes filed.



## Reflections Art Program by Becky Bruno



Are you recruiting your Reflections Chair for 2012-2013? We have great news! National PTA conducted a survey, and agrees with the overwhelming response that, although we love Reflections, most were frustrated by the administrative process behind it. Therefore they have greatly streamlined the program for next year.

The 2012-2013 "The Magic of a Moment" Reflections Chair Guidelines and training materials will be available in late May. It is good to start promoting the theme before school gets out so students can begin creating artwork, or at least become inspired to work on it over the summer.

I will be attending the Reflections training at the CA State PTA Convention in May, as well as the National State Convention in June with my co-chair, Julie Hale, so we should have a very good understanding of all the streamlined enhancements. I encourage anyone else attending either Convention to also attend the Reflections training. Then, at the beginning of the school year, training will be available to participating Fremont Council units. Please contact me contact with any questions at [bbruno4921@gmail.com](mailto:bbruno4921@gmail.com)



Becky Bruno  
Fremont Council PTA Reflections co-chair



## 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

## Parliamentarian Corner by Lisa Ogrey

### What do I do when my Bylaws are over 3 years old??????

This is a question that many unit Presidents and Parliamentarians may ask while looking over the signature dates on the copy of their bylaws. Before you close your set and put them aside, it is important that you realize that it is essential that you update these bylaws every 3 years. Not only is this necessary to remain in good standing, but it is critical in assuring that your unit is operating within your guidelines. Remember, your bylaws are your rules and regulations and are specific to YOUR unit. The way in which you conduct your meetings, events, and everyday duties is outlined within those pages. That is why each and every board member should have a copy that they have read and can reference when needed.

It is strongly recommended that your unit bylaws be reviewed annually and compared to the most current edition of the standard bylaws. It is also important to note that once the California State PTA has adopted a change for the standard bylaws for local PTA/PTSAs it is effective for all PTA/PTSAs whether the printed copy being used by your PTA includes that change or not. Amendments adopted by the California State PTA at the annual convention become effective for all PTA/PTSAs. This is why each year along with the Presidents summer mailing, a new color dated copy of boiler plate bylaws are included. That same boiler plate is available via Ebylaws making it easier than ever to update your units' bylaws. Here is the link to "Build your own bylaws" <http://www.capta.org/sections/management/e-bylaws.cfm>

As always, if you have any questions about this process or just basic Parliamentarian duties, please feel free to contact me at [logrey@pacbell.net](mailto:logrey@pacbell.net). And remember current bylaws makes for a contented Fremont Council PTA President. ☺

Until next month!

*Lisa Ogrey*

*Fremont Council PTA Parliamentarian*



\$\$\$\$\$

## Finance Corner

\$\$\$\$\$



Financial tips for the end of the school year:

It's time to tidy up the books (if necessary) and get ready for the year-end reports!

- Audit Checklist – Treasurers, go ahead and run through this form that is filled out by the auditor. It will help you make sure you've got everything in order for the audit and provide a smooth transition to the new treasurer.  
[http://www.capta.org/assets/downloads/forms/Audit\\_Checklist\\_Form.pdf](http://www.capta.org/assets/downloads/forms/Audit_Checklist_Form.pdf)
- Annual Financial Report – annual report produced by the treasurer detailing the year's income and expenses. This document will be required by the tax preparer. Click here for a sample from the Toolkit:  
<http://www.capta.org/assets/downloads/forms/UnitFinancialAnnualRepot.pdf>
- CT Registration – just about all units in Council have this in process. If you're still working on it, be sure to let me know if you need assistance. Please let me know the date that you put it in the mail to the State.
- Paying bills over the summer - The outgoing board can allow the new treasurer to pay outstanding bills over the summer by voting to pay those bills at the last meeting. **Also, the incoming board can adopt a preliminary budget in May or June that allows bills to be paid. The final budget is adopted in the fall.**  
[http://www.capta.org/assets/downloads/forms/Sample\\_Budget.pdf](http://www.capta.org/assets/downloads/forms/Sample_Budget.pdf)
- Encumbering the next board - A PTA board cannot make a commitment that involves activities in a future year. Exceptions: If a high school needs to sign a contract for the next year's graduation activity, cooperation can occur between the outgoing board and the incoming board. The board should make sure that this activity is what the students want, as a deposit could be lost if the students change their minds. Cooperation in saving money for a large project can also take place with boards of various years.
- Commingling of Funds – See this topic discussed elsewhere in this newsletter. Additionally if you do have Teachers Allotments, remember that if there are funds that aren't spent during the year, they are returned to the general PTA fund. All teacher balances are 0 on July 1.

Thanks for working so hard all year. If you have any questions on these or other topics, please let me know. Kim Mathis, 770-1297, [oemexp@att.net](mailto:oemexp@att.net)

**One more thing, be sure to go to District training on June 2. It is great information and you'll really get a sense that you are not alone. We've got a lot of resources - don't miss out on this great opportunity!**

# Good transitions = Great starts!

By the Leadership Commission of the California State PTA

The smooth transition of outgoing and incoming board members and officers is of vital importance and can determine your PTA's success for years to come. 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 prepared.

## Performance evaluation

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. Some of the questions outgoing leaders should ask themselves include the following:

- Did the PTA achieve the goals set at the beginning of the school year?
- Were efforts made to include more members in planning and working toward achieving the goals?
- Did PTA membership increase? Were more parents engaged?
- Were association meetings well-attended?
- Did the membership participate in making decisions?
- Was the membership effectively informed of PTA events and programs?
- Were PTA resources and information shared?

## Leadership materials handover

Outgoing officers should prepare all materials, records, and resources before turning them over. Update procedure books to include the following:

- List of PTA board members, addresses, phone numbers, and e-mail addresses
- List of names and contact information for those who have held the position in the past
- Current PTA bylaws and standing rules
- Current budget

- Job description for each officer and board position
- Summary of activities, results, and recommendations for improvement
- Reports of work for the year, including any committee reports and explanations of associated costs
- Minutes from all meetings (both board and association) for the past two years
- List of community partners and agencies with which a relationship was established
- Any information felt to be pertinent, especially when it fills in gaps that hindered the outgoing officers and board

## Roles and responsibilities

To ensure a successful term of office, certain responsibilities begin as soon as officers are elected. All board members and chairs are expected to:

- Uphold the policies and procedures of the state PTA and National PTA
- Prepare appropriately to fulfill the responsibilities of the office
- Study and follow unit bylaws and standing rules
- Attend and participate in meetings
- Abide by the will of the majority
- Respect the confidentiality of executive board business
- Protect members' privacy and the confidentiality of member information entrusted to PTA
- Meet due dates and fulfill assignments promptly
- Give accurate and detailed account of all monies PTA handled
- Cooperate with others by delegating tasks to appropriate individuals
- Attend conferences, workshops and conventions to develop and strengthen leadership skills
- Maintain a procedure book and appropriate records to pass on to successors
- Resign if unable to perform the required duties of the office




## Training and orientation

Encourage new officers to attend PTA trainings, especially the state and national conventions. Local, district, and regional PTAs often hold job-specific workshops tailored to unit needs. Participating in training serves to connect new leaders to a network of experienced leaders who can act as mentors during the year.

An orientation and planning meeting for a new executive board helps a PTA jumpstart the year by offering an opportunity to share ideas, review PTA resources, and create a working calendar. Agreeing on ground rules for board meetings, priorities in working styles, and preferences for types and timing of communication will set the stage for a productive team effort.

Activities of the board-elect may include:

- Registering the officers for convention
- Determining resources and materials needed, and ordering them
- Distributing copies of bylaws and job descriptions, if they were not included in procedure books
- Filling vacancies and ratifying appointments
- Brainstorming to set goals and prepare a master calendar
- Meeting with the school administrator
- Ensuring that the year-end financial report and audit take place so the budget committee can begin to plan

Outgoing officers should give support and information when requested, but they should remember that there is more than one way to do every job. Encourage those who follow to develop their own leadership style. The best reputation PTA leaders can have is to be known as good mentors who taught their successors well and provided the preparation needed for their PTA's continued success. 

*The Leadership Commission of the California State PTA can be reached at [leadership@capta.org](mailto:leadership@capta.org).*

## Transition basics for officers

- Finish the term.
- Complete all responsibilities, including updating your procedure book.
- Meet with current board to evaluate the activities and outcomes of the previous year. Send new board contact information to your council or district. In your state, local units may wish to use Just Between Friends, PTA's membership management and communications system, to keep track of such information.
- Meet with successor; introduce successor to key individuals.
- Turn over all PTA materials and resources that relate to position.
- Meet with the entire incoming and outgoing board to discuss the future of ongoing projects.

## Why you should elect new officers before school ends

Bylaws indicate when elections are held; but it is especially important to elect new officers before the current school year ends, not when the new school year starts.

Here are some of the drawbacks of starting a new school year without new officers.

- Months of transition and planning time are forever lost.
- The program and budget committees have inadequate time to develop and plan prior to the first association meeting, which leaves little time to give notice for and present plans to the membership for approval.
- The PTA executive board must play catch-up. It can take months to feel organized and prepared to lead the association effectively.
- Banking and check writing can be impaired if previous officers have moved on and financial procedures have not been properly addressed at the end of one fiscal year and the beginning of another.
- The transition of officers and chairs after an extended break loses helpful momentum for sharing and passing on information and materials. If past officers or chairs move to another campus or community, materials and procedure books can be lost.
- Newly elected officers miss the opportunity to participate in spring peer trainings that may be provided by the district and council PTA, as well as the National PTA Convention in June.
- Mailings of valuable resources and materials from the state and National PTA are missed or not received in a timely manner.
- The opportunity to promote PTA, build a relationship with the school, and publicize the PTA's role on campus is delayed, and momentum is lost.
- Administrators and school staff may be confused about who the PTA leaders are and how they intend to work with the school community.
- Opportunities are lost for valuable community building, networking, and volunteer recruitment, which normally begin when officers take office.
- The membership campaign gets a late start and cannot take advantage of the enthusiasm of a new school year.
- Students lose the opportunity to participate in Reflections, PTA's fine arts program, because there is inadequate time to plan, kick off, and meet entry due dates.

## Find out more

National PTA has several *Quick-Reference Guides*, in English and Spanish, to assist new officers in learning and performing their duties—one for presidents, one for membership chairs, one for treasurers, and one for program chairs. To download these guides, go to [PTA.org/reference\\_guides.asp](http://PTA.org/reference_guides.asp).



**Register by May 25th!**

Peralta District PTA's

## **ANNUAL TRAINING FOR PTAs**

*All PTA officers, chairmen, administrators in Alameda County are invited!  
Please join us! Training is a legitimate PTA expense.*

**SATURDAY, JUNE 2, 2012 ... 8:15 AM TO 2:15 PM**

**at Canyon Middle School  
19600 Cull Canyon Road, Castro Valley  
take Grove Way exit off of 580**

**Cost: \$15/person** includes continental breakfast & lunch

**Please respond early so we have enough handouts and food!**

*Those registered by May 25th receive a 2nd ticket for door prize drawings.*

### **WORKSHOPS OFFERED:**

*Session I (10:15 - 11:45)*

- Presidents - Part 1 of 2
- Financial Responsibilities for all board members
- Audits
- Programs, Reflections, Arts
- Membership
- Bylaws & Parliamentary

*Session II (12:30 - 2:00)*

- Presidents - Part 2
- Treasurer
- Minutes
- Fundraising Fundamentals
- Communications & websites
- Resolutions & Advocacy

*Please see reverse for workshop descriptions & presenter information.*

### **CONFERENCE SCHEDULE**

8:15 - 9:00	Registration / continental breakfast
9:00 - 10:00	<b>GENERAL SESSION</b> & Association Meeting <i>Keynote Speaker: Jo A.S. Loss, Immediate Past President, California State PTA</i>
10:00 - 10:15	Break
10:15 - 11:45	WORKSHOPS session I
11:15 - 12:15	Lunch with Q&A/table topics
12:30 - 2:00	WORKSHOPS session II

***Every PTA should send at least one person!***

## WORKSHOP PRESENTERS and DESCRIPTIONS

### **Presidents - Part 1 of 2 (both suggested)**

*Susan Nathan, Peralta District PTA President*

What every PTA/PTSA president should know from the beginning. Set yourself up for success! This workshop will help you gain understanding of the big picture of PTA and then learn how to find and use all the resources available to you to be a capable and confident president.

### **Presidents - Part 2 (both suggested)**

*Susan Nathan, Peralta District PTA President*

Strong healthy units do great things! As president, your leadership is vital! This workshop will cover how to make sure your PTA/PTSA is strong. Topics: successful meetings, what's due, and tips on working with your board. Time will be given for Q&A.

### **Financial Responsibilities for all board members**

*Diane Foote, California State PTA Leadership Commissioner and Linda Mel Contreras, Peralta District PTA Treasurer*

Every board member has IRS mandated fiduciary responsibilities. Additional topics include planning/budgeting, legal and tax requirements, insurance, contracts and PTAEZ.

### **Treasurer**

*Diane Foote, California State PTA Leadership Commissioner and Linda Mel Contreras, Peralta District PTA Treasurer*

This workshop will help you start and complete your job. Topics include: banking, money handling, authorizations and reimbursements, required reporting in PTA format.

### **Audits**

*Nancy Mitchell, Peralta District PTA Financial Secretary*

Evaluating and documenting the financial procedures of your PTA. How audits can strengthen your PTA and improve your procedures.

### **Secretary**

*Nancy Mitchell, Peralta District PTA Financial Secretary & Fremont Council PTA Secretary*

Recording the minutes and activities of your PTA. What to include & what not to include. Why minutes are important to the organization and its officers.

### **Programs, Reflections, Arts**

*Maggie Steele, California State PTA Vice President for Programs/Members Services and Pam Chang, Peralta District PTA Arts Advocacy Chairman*

Spotlighting PTA programs that work for your school. How to get started on Reflections over the summer. How the arts increase parent involvement.

### **Fundraising Fundamentals**

*Carol-Ann Koch-Weser, California State PTA Leadership Commissioner*

Understand the basics of fundraising in PTA: our noncommercial policy, the 3-to-1 rule, making sure it's not the primary activity, and insurance.

### **Membership**

*Carol-Ann Koch-Weser, California State PTA Leadership Commissioner*

Learn strategies for inviting, involving, and retaining members to build a welcoming PTA, including themes, incentives, promotions and more!

### **Communications -Getting the word out!**

*Joan Nurge, Peralta District PTA Vice President for Communications*

Your PTA has done something great, or needs volunteers, or is hosting an event—how do you get the word out? Learn PTA basics for communication and explore various options to *get the word out!*

### **Bylaws & Parliamentary**

*Allison Wiscombe, Peralta District PTA Executive Vice President*

Every PTA needs to hurry and update their bylaws in order to get a CT# by December. Come learn how to renew your bylaws using PTA's electronic bylaws system. We will also cover parliamentary basic -- roles, responsibilities, Robert's Rules.

### **Resolutions & Advocacy**

*Tom Horn, California State PTA, Legislation Team Advocate and Jamie Hintzke, California State PTA Resolutions Committee Chairman*

Maximize your effectiveness in advocating for kids on state and local issues: preparing effective messages, making your efforts count and enlisting others in the cause. Submitting resolutions for convention is one component of advocating for your child.

PERALTA DISTRICT PTA ANNUAL CONFERENCE - SATURDAY, JUNE 2, 2012

**REGISTRATION FORM** - *please print clearly*

Number of registrants on this form \_\_\_\_\_ x \$15.00 per person = \$ \_\_\_\_\_

Make check payable to: Peralta District PTA and mail to:

*Nancy Mitchell, 44999 Cree Court, Fremont 94539*

<b>Name of PTA:</b>		<b>Council or city:</b>	
<b>Attendee #1:</b>		<b>PTA Office Held in 2011-12:</b>	<b>PTA Office for 2012- 2013:</b>
Street Address:			
City and zip:	Phone:		
Email:			
<b>Session I (circle one of the 6):</b>		<b>Session II (circle one of the 6):</b>	
<ul style="list-style-type: none"> <li>• <i>Presidents, Part 1</i></li> <li>• <i>Financial Responsibilities</i></li> <li>• <i>Programs, Reflections, Arts</i></li> <li>• <i>Membership</i></li> <li>• <i>Bylaws &amp; Parliamentary</i></li> </ul>		<ul style="list-style-type: none"> <li>• <i>President, Part 2</i></li> <li>• <i>Minutes</i></li> <li>• <i>Communications &amp; websites</i></li> <li>• <i>Resolutions &amp; Advocacy</i></li> </ul>	
<i>Circle sandwich choice:</i>		<i>BEEF</i>	<i>TURKEY</i>
		<i>VEGETARIAN</i>	
<b>Attendee #2:</b>		<b>PTA Office Held in 2011-12:</b>	<b>PTA Office for 2012- 2013:</b>
Street Address:			
City and zip:	Phone:		
Email:			
<b>Session I (circle one of the 6):</b>		<b>Session II (circle one of the 6):</b>	
<ul style="list-style-type: none"> <li>• <i>Presidents, Part 1</i></li> <li>• <i>Financial Responsibilities</i></li> <li>• <i>Programs, Reflections, Arts</i></li> <li>• <i>Membership</i></li> <li>• <i>Bylaws &amp; Parliamentary</i></li> </ul>		<ul style="list-style-type: none"> <li>• <i>President, Part 2</i></li> <li>• <i>Minutes</i></li> <li>• <i>Communications &amp; websites</i></li> <li>• <i>Resolutions &amp; Advocacy</i></li> </ul>	
<i>Circle sandwich choice:</i>		<i>BEEF</i>	<i>TURKEY</i>
		<i>VEGETARIAN</i>	
<b>Attendee #3:</b>		<b>PTA Office Held in 2011-12:</b>	<b>PTA Office for 2012- 2013:</b>
Street Address:			
City and zip:	Phone:		
Email:			
<b>Session I (circle one of the 6):</b>		<b>Session II (circle one of the 6):</b>	
<ul style="list-style-type: none"> <li>• <i>Presidents, Part 1</i></li> <li>• <i>Financial Responsibilities</i></li> <li>• <i>Programs, Reflections, Arts</i></li> <li>• <i>Membership</i></li> <li>• <i>Bylaws &amp; Parliamentary</i></li> </ul>		<ul style="list-style-type: none"> <li>• <i>President, Part 2</i></li> <li>• <i>Minutes</i></li> <li>• <i>Communications &amp; websites</i></li> <li>• <i>Resolutions &amp; Advocacy</i></li> </ul>	
<i>Circle sandwich choice:</i>		<i>BEEF</i>	<i>TURKEY</i>
		<i>VEGETARIAN</i>	





# Time to Celebrate Our Most Precious Treasure – YOU!

*Fremont Council PTA Awards & Installation Event*  
*Monday May 21<sup>st</sup>, 7:00-9:00pm*  
*FUSD Board Room, 4210 Technology Drive*

Throughout the year, Fremont PTAs have *polished* up their programs, collected members and *shined* in *multi-faceted* ways. Now it's time to reveal just how *dazzling* they are!

We invite your current and incoming boards to come together and celebrate our collective achievements – and to hear more about dazzling programs and gems of ideas that you can make your own next year.

Enjoy nibbles and desserts while you network with other PTAs and think ahead to the possibilities of next year.

*Come join us! Includes an extended snack buffet for only \$5 per person. For planning purposes, please be considerate and complete and return the RSVP form below by **May 15th**. If you need to pay at the door, then please arrive at 6:45.*

Name / Title \_\_\_\_\_ Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Unit / School or PTA / PTSA Affiliation \_\_\_\_\_

Number of People Attending \_\_\_\_\_ @ \$5 each

Total Amount Enclosed / Due \$ \_\_\_\_\_  
 (make checks payable to Fremont Council PTA)

Please mail your reservation & payment by May 15 to:  
 Meryl Shatzman  
 39348 Monterey Way  
 Fremont, CA 94538

or email your RSVP by May 15 to [merylshatzman@yahoo.com](mailto:merylshatzman@yahoo.com)

*Please list the names/titles of those attending:*

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

