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### Calendar

Please review and retain for reference our

#### 2017-18 CALENDAR

### 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](mailto: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.

### Greetings!

**We want to stay in touch with the right people,** that is, current 2017-2018 officers at your PTA. Please be sure to add any newly elected 2017-18 officers to the newsletter distribution list by entering their email addresses into PTAEZ.

**In the meantime PLEASE SHARE THIS NEWSLETTER WITH YOUR OTHER BOARD MEMBERS.**

The window for entering officer/board member contact info into PTAEZ was May 15th thru June 1st. After June 1st, any units lacking contact info in PTAEZ are considered by California State PTA as being units "Not in Good Standing" or NGS for short.

**Please contact [newsletter@peraltdistrictpta.org](mailto:newsletter@peraltdistrictpta.org) if you require assistance.**

**If your PTA has not elected 2017-18 officers and is having difficulty,** please contact **the Peralta District PTA president** to let us know your status and allow us to help.

Liz Fischer  
4th VP of Communications  
Newsletter Editor

### PLANNING AHEAD FOR TRAINING

#### *Did you miss the annual state convention in San Jose?*

**The 2018 convention will be in Ontario so be sure to allocate some funds in your budget** so that at least one or more people can attend. It's terrific training and provides amazing networking opportunities.

#### *Did you miss Peralta's Annual Officer Training on June 3rd?*

Fortunately we have a shorter training (only one session of workshop choices) **the evening of August 28th**...so mark your calendar now.



### "Sacramento Update"

To see the most up to date legislative alerts on the California State PTA website go to

## 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: Purvi Shah**  
**2nd VP-Programs: open**  
**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](#)**



California State PTA website go to <http://capta.org/focus-areas/advocacy/legislative-action-reports/>

Be sure to check California State PTA's **position statements** before planning any advocacy efforts.



PTA REFLECTIONS

## "Within Reach"

is the 2017-18 Reflections theme.

If you are interested in starting Reflections at your school next year, please contact [reflections@peraltadistrictpta.org](mailto:reflections@peraltadistrictpta.org)

## 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](#)

## MEMBERSHIP UPDATE



### 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](mailto:membership@peraltadistrictpta.org) to arrange to purchase envelopes.

### Membership cards for 2017-18 are in!

contact [membership@peraltadistrictpta.org](mailto:membership@peraltadistrictpta.org) to arrange to 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.

### Member Benefits from California State PTA

### Member Benefits from National PTA

## The Importance of Minutes

*It might come as a surprise that the auditor examines the minutes as well as the financial documents during the mid-year and year-end audits. Just as the financial documents report how and where money was spent, minutes need to contain the motion stating the purpose and amount of funds approved otherwise spending is not authorized.*

*Other important financial information contained in the minutes are a list of checks ratified at each meeting, what bills were approved to be paid and any future funds needing to be released. And always minutes should contain the beginning and ending balance for each account.*

*In addition to writing the minutes, the secretary needs to sign each Payment Authorization form in*

## Services:

[e-Bylaws](#)

[PTAEZ](#)

[PTA Merchandise Store](#)

[Tax Support Center](#)

[e-learning](#)

National PTA's  
Training modules

## PTA Publications:

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

[Social Media Advocacy Guide](#)

[Leadership Essentials Archive](#)

[Local Control Funding  
Formula](#)

[Parents' Guide to Student  
Success](#)

In addition to writing the minutes, the secretary needs to sign each Payment Authorization form in addition to the president, verifying it was approved at a meeting and noting the date approved. This is because when auditing the books of a PTA, an auditor is looking to see that each expenditure was approved and recorded in the minutes.

Minutes are the official legal record of the PTA and should be typed or written in permanent ink and kept in a bound book. Minutes should be brief and include what actions were decided upon, not what was discussed. All motions should be recorded and should include who made the motion and whether or not it was adopted. (The name of the member who seconded the motion is not recorded.)

Secretaries hold one of the three required positions in a PTA, and have the added responsibility of being the keeper of the unit's legal documents including minutes, bylaws, standing rules, and charter.

**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)



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