



PTSA GENERAL MEETING 3/19/2026

AGENDA

1. **Pizza (6:00 - 6:30)**
2. **Welcome (6:30-6:35)**
3. **Principal's Message (6:35-6:45)**
4. **25/26 Ongoing work (6:45-7:10)**
Improvements, Fundraising
5. **Nominating Committee (7:10-7:15)**
6. **Financials & Budget (7:15-7:20)**
7. **Budget Committee (7:20-7:30)**
8. **"Generative AI: Risks and Solutions" with filmmaker Lisa Tabb of *Screenagers* (7:30-7:50)**
9. **Open Forum Comments/Questions (7:50-8:00)**
10. **Adjourn (8:00)**

Welcome and Introductions

Lanada Reed
PTSA President



**OAKLAND TECH
PTSA**

President - Lanada Reed

Treasurer - Daniel Kramer

Communications - Steve Wiersema

Parliamentarian - Josh Kahn

Financial Secretary - Amy Hood

Recording Secretary - Khadijah Robinson

VP Membership - My Huynh

VP Development - Becky Chaplin-Kramer

Historian - Ranjeet Rajan

VP Parent Engagement - Mimi Ho

VP Events - Rachel Smith

Principal's Message

Martel Price



Help us find new Culture Keepers for Tech!



25/26 Ongoing Work

Improvements - Steve

Fundraising - Becky

College & Career - Bernadette, Mimi

Events - Rachel

Parent Engagement - Mimi

Membership - My

Improvements

Martel Price

(in Steve Wiersema's absence)

Improvements - Wellness Center Lower Campus

TO DO

- Add sliding doors to "office"
- Make partition panels if \$ exists

**PAID WITH OUSD
GRANT & SOME PTSA
IMPROVEMENT
FUNDS**



Improvements - Wellness Center Upper Campus

TO DO

- Purchase additional furniture and fixtures with grant funds

**PAID WITH OUSD
GRANT & MINIMAL
PTSA IMPROVEMENT
FUNDS**



**Past
Improvements:
AV Cart in use
@ Lip Sync
Pre-Show**

**PAID WITH PTSA
IMPROVEMENT
FUNDS**



Fundraising

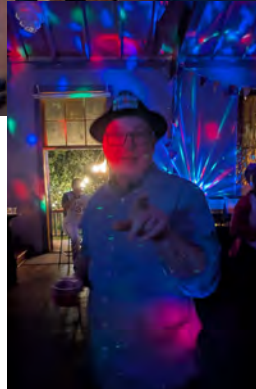
Becky Chaplin-Kramer

Auction Fundraising Report

Silent Auction	\$23,590.00
Donations/Paddle Raise	\$23,487.43
Live Auction	\$19,850.00
Sign up parties	\$14,620.00
Ticket sales	\$8,275.00
Sponsors	\$6,250.00
Miscellaneous	\$4,144.70
TOTAL	\$100,217

- + building community, connections
- + welcoming freshmen families
- + so much fun

PRICELESS!!!!!!!!!!



Upcoming fundraising events!

MARCH 28th



GET TICKETS HERE!



Upcoming fundraising events!
APRIL 17th



**Hosted by Steve Wiersema & Anne Wilkinson,
Mark Martin & Katie Broughton**

GET TICKETS HERE!



Upcoming fundraising events!

APRIL 25th

RIDE 4A REASON

RIDE OR VOLUNTEER



Upcoming fundraising events!
MAY 9th!
PIZZA PARTY



**Hosted by Sherri & Chris Heller,
Shelly Cox & Chris Weidenbachx**

GET TICKETS HERE!



College & Career Center

Bernadette Leduc

Mimi Ho

College Fair March 16th

Junior Class “Push ins” in classroom

- **Self reflection**
- **Post secondary - 4 & 2 yr colleges, community college, trades**
- **College qualities, list**

May, Summer, Fall

- **College Mentor Program**
- **UC Activities list support**

**Grade, Academy or Affinity Group Parent
I'm interested - tell me more!**



- **To partner with the lead Tech staff or teacher to engage parents in key events, projects for our students!**
- **Community building to support each other, our kids & the school community**
- **This role is what WE/YOU make of it!**

Parent Engagement

Mimi Ho

Grade, Academy or Affinity Group Parent I'm interested - tell me more!

- **To partner with the lead Tech staff or teacher to engage parents in key events, projects for our students!**
- **Community building to support each other, our kids & the school community**
- **This role is what WE/YOU make of it!**

Tech Community Care Walks



College & Career Center

Bernadette Leduc

Mimi Ho

College Fair March 16th

Junior Class “Push ins” in classroom

- **Self reflection**
- **Post secondary - 4 & 2 yr colleges, community college, trades**
- **College qualities, list**

May, Summer, Fall

- **College Mentor Program**
- **UC Activities list support**

Nomination Committee

Josh Kahn

NOMINATION COMMITTEE FOR PTSA BOARD POSITIONS

Are you interested in serving on next year's PTSA board? (it's rad)

Or are you interested in volunteering on the nomination committee to help us identify strong candidates for next year's PTSA board? (also rad)

👉 email PTSA Parliamentarian Josh Kahn: thejoshkahn@gmail.com

PTSA Financials

Daniel Kramer
PTSA Treasurer



2025-2026

PTSA Meeting
Finance Slides

Oakland Tech PTSA

Treasurer's Report

March 19, 2026 General Association

Snapshot of current bank account balances:

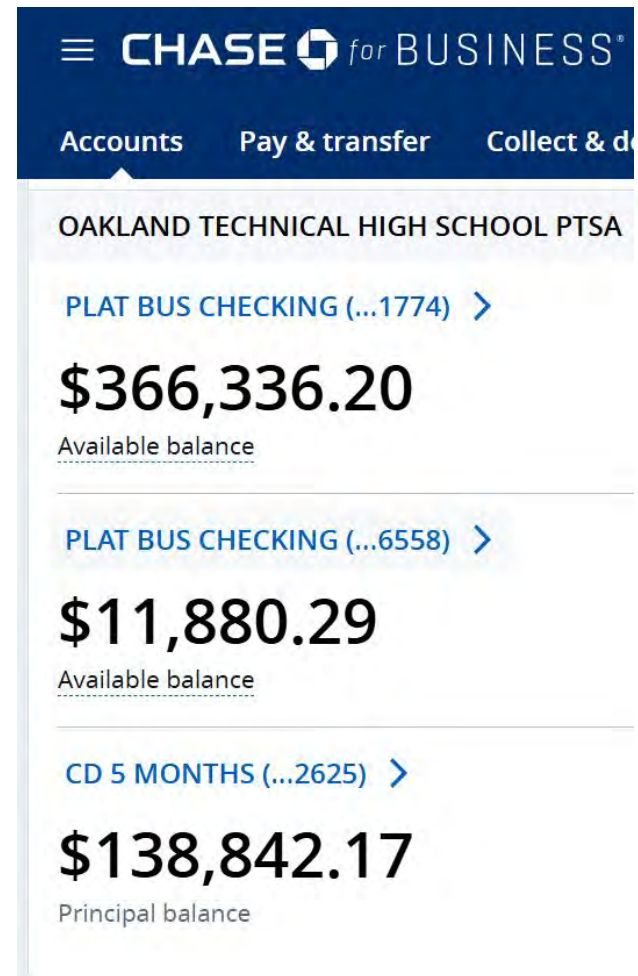
- Checking 1774: **\$366,336.20**
- CD 5 Months: **\$138,842.17**

OFOD-RHF (sponsored project):

- Checking 6558: **\$11,880.29**

Attached Reports

- [Balance Sheet as of 03-19-2026](#)
- [Profit & Loss as of 03-19-2026](#)
- [PTSA Budget for FY 2025-26](#)



The screenshot shows the Chase for Business mobile app interface. At the top, there is a dark blue header with the Chase logo and 'for BUSINESS' text. Below the header, there are navigation tabs: 'Accounts', 'Pay & transfer', and 'Collect & d'. The main content area displays three account balances for 'OAKLAND TECHNICAL HIGH SCHOOL PTSA'. Each account entry includes the account name, a balance amount, and the type of balance (Available or Principal).

Account Name	Balance	Balance Type
PLAT BUS CHECKING (...1774)	\$366,336.20	Available balance
PLAT BUS CHECKING (...6558)	\$11,880.29	Available balance
CD 5 MONTHS (...2625)	\$138,842.17	Principal balance



Discussion Items

- Weekly updated **Budget vs. Actual** reports are now available at <https://bit.ly/TechPTSAbudget>. Woot. I am generally updating these each Friday afternoon.
- In January we sent all **1099 forms** for non-employee compensation paid by the Tech PTSA in 2025.
- We have begun preparations for **FY 2024-25 annual tax filings** after we filed our extension last fall.
- February books have been closed. Current reports from QBO are linked above.



Discussion Items

- We are still waiting on CA FTB to **restore our CA state exempt status**, which would allow us to access PayPal Giving Fund again. Our packet was submitted on September 26, 2025. At that time they said that application / reinstatement wait time was five months, they now say it is currently nine months. I call CA FTB regularly :)
- Thanks to a referral from Anne Mawdsley we have engaged a volunteer for our 6-month **financial review (internal audit)**. Everything looks good and he is preparing the formal report which will be presented to the Board at their next meeting, then to the GA for formal approval.



PSAT Test Funds

- As you may remember the Tech PTSA set up a **managed fund** last fall to process the fees for the October 2025 PSAT test date, similar to how the Tech PTSA has processed AP test fees in the past.
- Each student who took the PSAT this past October **paid \$25 = \$18 test fee for College Board + \$7 fee to cover proctoring and custodial costs**, except for students who qualified for free / reduced lunch; they only paid the \$7 fee. Our intent was that OUSD would pay the \$18 test fee to the College Board for all the free / reduced lunch students, and the Tech PTSA would remit the remaining balance due to the College Board to pay for all the other students' test fees.



PSAT Test Funds

- However, **OUSD had funds to pay for all student test fees**, meaning that the Tech PTSA now has money in a managed fund that was supposed to have been -- and now cannot be -- spent on the cost of the October 2025 PSAT test
- To resolve this situation we emailed each of the 80 individuals who paid the full \$25 fee, briefly explained the situation and asked for their permission to redirect their portion of the unused funds to defray the costs of future PSAT test dates;
- Or we **offered a refund of \$18** once they email their name and mailing address to the PTSA Treasurer



PSAT Test Funds

- Anyone who formally requested a refund by the Friday, February 13 deadline received an \$18 refund via Zeffy to their original form of payment. In total **only 3 individuals requested refunds.**
- We now need to create a new Tech PTSA budget line for PSAT / SAT Exam and Custodial and Proctor Fees, and use the remaining \$1,355 in the PSAT Test Fees Managed Fund to fund it. This new general fund expense account will be available to pay for proctor and custodial costs for the spring 2026 test date. In doing so we should essentially make the spring 2026 PSAT test free for all sophomores. Formal motion for Board approval is below.



Motion #1: Revised budget for FY 2025-26

- Propose we formally revise the FY 2025-26 Tech PTSA budget as shown [here](#). All of these budget revisions have been approved by the board. Highlights include:
 - Increase **Cross Country** budget lines (income and expense) to \$7,200 based on what they raised this year so they can spend it now on coaching stipends.
 - Increase **Black Graduation** budget line (income and expense) to \$4,000 based on what they will raise this year so they can spend it on this year's event.
 - Create a new expense line for **PSAT / SAT Exam and Custodial and Proctor Fees** in the amount of \$1,355. Details above.
- **The Treasurer moves to revise the FY 2025-26 budget as detailed in this [budget document](#)**
- Rationale: New fundraising (already received) would offset any new expenses. No anticipated impact on overall net revenue (income minus expenses) for the year.



Motion #2: Ratify paid bills

- The Treasurer moves to ratify paid bills in the attached spreadsheet, in accordance with the approved FY 2025-26 budget. Please note, these transactions were previously approved by the PTSA Board at their 02-03-2026 and 03-03-2026 meetings.
 - [Full transaction report from QBO](#)
 - Including checks:
 - 7038: Peralta PTA membership remit
 - 7039: HBCU Tours managed fund
 - 7040: Auditorium restricted fund
 - 7041: Cafeteria restricted fund
 - 7042: Paideia trips managed fund
 - 7043: Auditorium restricted fund
 - 7044: Cafeteria restricted fund
 - 7045: Paideia Trips managed fund
 - 7046: Paideia Trips managed fund
 - 7047: HBCU Trips managed fund
 - 7048: Auditorium restricted fund
 - 7049: Paideia Trips managed fund
- Rationale: these expenditures have already been approved by the PTSA board and general association, and have received the required double approval before being paid. This ratification of paid bills is required by California State PTA and our unit bylaws.



FY 2026-27 PTSA Budget Process



Budget Process Overview

The Tech PTSA raises funds to support Oakland Tech's vision to be a model of equity and access, using high-quality pathways and social-emotional supports to ensure that every student takes ownership over their learning, engages in rigorous academic discourse, and graduates college-, career- and community-ready.

Specifically, the Tech PTSA works as a partner with the school administration when there are gaps in federal, state, and local funding which would otherwise prevent the school from accomplishing its vision. The PTSA strategically uses its limited funds to have a maximum impact at Tech.



Budget Process: Approval and Timeline

Each spring the Tech PTSA develops an annual budget for the following school year. The budget must be approved by a majority vote by each of the following groups:

- PTSA budget committee
- Current PTSA executive board (**May 5**)
- Current PTSA General Association (**May 21**)
- Next year's PTSA General Association (**August**)

The PTSA uses this process to establish its budget for the entire year, rather than providing discretionary spending or micro-grants throughout the year. Though the PTSA can pass subsequent budget revisions, these are rare exceptions and not the PTSA's general practice.



Budget Process

- Develop fundraising targets for FY 2026-27
 - Channel fundraising
 - Annual fund, auction, corporate match, etc.
- Meet with Tech admin and teachers to determine school-wide and academic priorities
- Meet with student council, ASB, and leadership to determine student priorities
- Receive budget requests from parents and community members
- In the event that proposed spending exceeds the expected fundraising, the PTSA will support proposals which benefit the maximum number of people the proposal is designed to serve



Budget Process: Policies

In general, the PTSA strives for a balanced annual budget in which income equals expenses.

However there may be times when the PTSA decides to deviate from this, e.g. raising funds for a capital campaign in one year, and spending them in a subsequent year.

The PTSA has a policy of keeping a 3-month (25%) cash reserve at all times.



Join the PTSA Budget Committee!

Approx 5 hours / week

Approx 6 weeks, March 23 to May 5

Some work can be done async

Approx 3-4 Zoom meetings

Approx 1-2 IRL meetings at Tech, morning or afternoon

Guest Presentation:
**“Generative AI: Risks and
Solutions”**
Discussion with filmmaker
Lisa Tabb of *Screenagers*

Comments & Questions

Lanada Reed