



PTSA GENERAL MEETING 5/21/2026 AGENDA

- 1. Welcome (6:30-6:35)**
- 2. Principal's Message (6:35-6:45)**
- 3. 25/26 Ongoing work (6:45-7:10)**
Improvements, Fundraising
- 1. Nominating Committee (7:10-7:15)**
- 2. Financials & Budget (7:15-7:20)**
- 3. Budget Committee (7:20-7:30)**
- 4. Adjourn (8:00)**

Principal's Message

Martel Price

Please accept my apologies for missing this meeting. As Principal, I am forever fortunate for the role of the pTSA at Oakland Tech as the group is a major part of my success as a Principal and the success of the school.

- What's Happening Now:
 - Senior Checkout (it was a little crazy, but they actually said it was better than last year!)
 - Last week of school; Finals start on Friday afternoon (Period 1); Schedule change next week will have earlier excusal times
- In the future
 - Cell phone ban in OUSD/at Oakland Tech
 - Communications coming to prepare students and families
 - Need to work with Staff around plan
 - Will probably ask students to keep out of sight/use phone boxes in classrooms.
 - Some teachers are hesitant to enforce however...we will need parental support
 - Hiring for open positions:
 - Social Studies position
 - SpEd
 - Assistant Principal
 - Counselor



Help us find new Culture Keepers for Tech!



Fundraising

Becky Chaplin-Kramer

Year End Fundraising Report

Annual Fund Campaign	\$ 129,560.02
Auction	\$ 102,311.49
Channel Fundraising	\$ 74,437.07
TOTAL	\$ 306,308.58

Nomination Committee

Josh Kahn

PROPOSED 2026-27 PTSA BOARD SLATE

President - Ranjeet Moorthy

Treasurer - Derek McDonald-Juresa

Recording Secretary - Kita Brown

Financial Secretary - Amy Hood

VP Development - Becky Chaplin-Kramer

VP Events - Rachel Smith

VP Communications - Anne Mawdsley

VP Membership - My Huynh

Campus Improvements - Mark Martin

Sports Liaison - Khadija Robinson

Historian - Paul Carp

Parliamentarian - Josh Kahn

PTSA Financials

Daniel Kramer
PTSA Treasurer



2025-2026

PTSA Meeting
Finance Slides

Oakland Tech PTSA

Treasurer's Report

May 21, 2026 General Association

Snapshot of current bank account balances:

- Checking 1774: **\$329,057.84**
- CD 5 Months: **\$140,942.83**

OFOD-RHF (sponsored project):

- Checking 6558: **\$14,737.39**

Attached Reports

- [Tech PTSA Balance Sheet 05-21-2026.pdf](#)
- [Tech PTSA Profit & Loss 05-21-2026.pdf](#)
- [Tech PTSA Budget FY 2025-26, as approved August 21, 2025](#)

OAKLAND TECHNICAL HIGH SCHOOL PTSA

[PLAT BUS CHECKING \(...1774\)](#) >

\$329,057.84

[Available balance](#)

[PLAT BUS CHECKING \(...6558\)](#) >

\$14,737.39

[Available balance](#)

[CD 6 MONTHS \(...2625\)](#) >

\$140,942.83

[Principal balance](#)



Discussion Items

- Weekly updated **Budget vs. Actual** reports are always available at <https://bit.ly/TechPTSAbudget>. Current version was updated on Monday, May 18, 2026. Generally updated each Friday afternoon.
- April books should be **closed** tomorrow afternoon. Apologies, it's a busy time of year for our bookkeeper! Current reports from QBO are linked above.
- Insurance: The Tech PTSA recently paid \$618.60 in **Workers Comp insurance premium**, as mandated by CAPTA. Filing [here](#), attachment [here](#).



Taxes

- FY 2024-25 **tax filings** are complete. Hurrah! As a reminder, we had previously filed extensions on our tax filing deadlines. All these docs are available on the new Tech PTSA shared drive in Google:
- Federal [FY 24-25 990 and related schedules.pdf](#)
- State [FY 24-25 CA 199 and related schedules.pdf](#)
- State AG Form [FY 24-25 RRF-1 and copy of the 990 to file with it.pdf](#)



Taxes

- **Recommend that the Tech PTSA work with a different tax prep contractor for FY 2026-27 taxes.** Suggest reaching out to <http://www.mscpallp.com/> (had previously filed tax returns for Chabot PTA and Claremont PTA) to request a quote, though most any tax prep firm with a grasp of modern software would be an upgrade.
- 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 :)



Financial Review

- As you know, consistent with [CAPTA guidance](#) the Tech PTSA submits itself to a twice-a-year **internal audit**, for the periods Jul 1 to Dec 31, and Jan 1 to June 30. As you may remember Anne Mawdsley helped us identify David James (grandfather of a current Tech student) who would be willing to serve as our internal auditor / financial reviewer for the period Jul 1 to Dec 31, 2026. His report can be found here: [Financial Review Report Jul 1 - Dec 31, 2025.pdf](#)



Motion #1: Adopt the Financial Review

- **Our financial reviewer David James has examined the records of the Treasurer of Oakland Tech's PTSA and finds them to be substantially correct. The Treasurer moves that the audit report for the 6-month period ending Dec 31, 2025 be adopted.**



Proposed Revisions to Current Budget

- Based on EOY updates, please review the current budget doc: [Tech PTSA Budget FY 2025-26, as approved August 21, 2025](#) with **yellow highlighted rows** for the budget lines with **proposed budget revisions**
 - ADD: Funding for 9th Grade TAP Night
 - REMOVE: eight budget lines which won't get spent this year.

71064 Dia De Los Muertos
71065 Honor Roll
73010 Environmental Science
73020 Garden and Green Tech

73055 Paideia (not trips)
75000 Extra Curricular Activities
75350 Peer Mentors / Civic Projects
75500 Stock Club

- ADD: Retained net earnings to carry over to FY 2026-27 to help balance the draft budget for next year.



Motion #2: Revise Budget for FY 2025-26

- Propose we revise the current FY 2025-26 Tech PTSA budget in order to add funding for 9th Grade TAP Night, remove eight budget lines which won't get spent this year, and add retained net earnings to carry over to FY 2026-27.
- **The Treasurer moves to revise the current year FY 2025-26 budget as detailed in the [budget document](#)**
- Rationale: TAP Night was recommended to be included in the FY 2025-26 budget, but was missed in the staff transition last summer. The retained net earnings are required as part of the FY 2026-27 budget.



DRAFT Budget for FY 2026-27

- The Budget Committee is proposing the [DRAFT Tech PTSA Budget FY 2026-27](#). Huge thanks to **Amy Hood, Derek McDonald-Juresa, and Michael Alexander** who served on the budget committee; to Mr. Price who provided feedback about current school priorities and where the PTSA can be strategic in its funding; and an extra thanks to Amy Hood who surveyed 98+ Tech parents, teachers, students, and community members about their priorities for the upcoming year. We request **approval of the Draft Budget by the board** tonight.



DRAFT Budget for FY 2026-27

- Summary:
 - \$290k income (5% decrease YOY)
 - \$310k expenses (of which \$264k / 85% is for programs)
 - \$20k in net retained earnings to balance the budget
- In general we attempted to streamline the budget doc, make it more user friendly.



DRAFT Budget for FY 2026-27

- Propose moving Library from Managed Fund to General Fund (as approved by Mx. Grewal)
- Propose moving HBCU Tours from Managed Fund to fiscal sponsor / sponsored project
- Propose \$5,000 support for each academy
- Propose \$2,500 support for each VAPA program
- Consolidate several budget lines into a School Culture Fund



Motion #3: Adopt Budget for FY 2025-26

- The Treasurer moves to approve the [DRAFT Tech PTSA Budget FY 2026-27](#)



Motion #4: 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 04-14-2026 and 05-05-2026 meetings.
 - [Full transaction report from QBO](#)
 - Including checks:

■ 7050: HBCU Tour (stopped payment)	■ 7071: CA Department of Justice (RRF-1 filing fee)
■ 7051-7061: HBCU Tours	■ 7072-7074: Paideia Trips
■ 7062-7064: PSAT Tests	■ 7075: AIM WC premium
■ 7065: PSAT Tests (stopped payment)	■ 7076: PSAT Tests (replacement for check 7065)
■ 7066-7067: HBCU Tour	■ 7077-7079: Cross Country
■ 7068: Paideia Trip	■ 7080: Humanities
■ 7069: Auditorium Fund	■ 7081: Paideia Trips
■ 7070: Paideia Trip	■ 7082: AP Tests
- 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.

Campus Improvements

Steve Wiersema

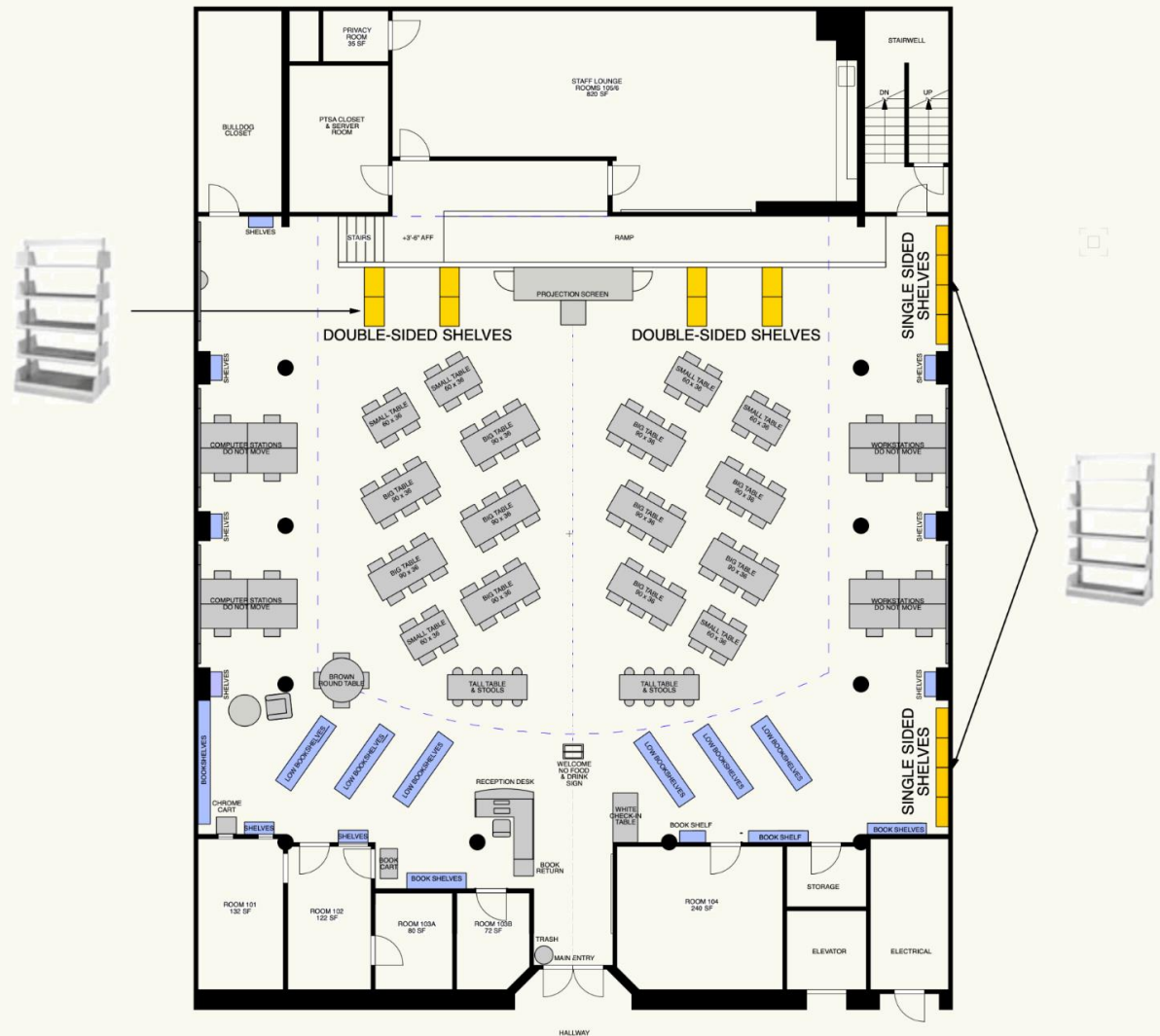
Summer Projects - Library

TO DO:

- Install single-sided shelves in two locations
- Install double-sided shelves in four locations

72% INCREASE IN SHELVING!

**PAID WITH
PTSA GENERAL LIBRARY
FUND &
MANAGED LIBRARY FUND**



Summer Projects - Lobby

TO DO:

- Install three large framed spirit banners
- Install BoBo statue

PAID WITH
PTSA GENERAL
COMMUNITY-WIDE
MESSAGING FUND

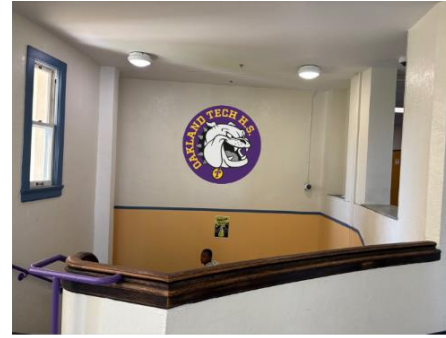


Summer Projects - Hallway & Stairwells

TO DO:

- Install spirit panels in the hall and stairwells

PAID WITH
PTSA GENERAL
COMMUNITY-WIDE
MESSAGING FUND



Summer Projects - Music Room



TO DO:

- Install album cover graphics of bay area artists, 21 total

PAID WITH
PTSA GENERAL
IMPROVEMENT FUNDS

Summer Projects - Auditorium



SUMMER TO DO:

- Buy a new lift
- Clean carpet
- Get curtain inspected for fire safety
- etc.



**PAID WITH
PTSA AUDITORIUM
RESTRICTED FUND**

Summer Projects - Engineering



TO DO:

- Install new board covers on drafting table for Dual Enrollment architecture class next year

**PAID WITH
NON-PTSA DUAL
ENROLLMENT FUNDS**

Comments & Questions