

President

Debbie Vincent

Responsibilities of Officers

A transition will happen at the end of the PTA year --

Will you be ready? Will the incoming officers be ready?

All officers should be mentoring fellow volunteers to learn how to do the job when the opportunity becomes available. The extra benefit to this is that more hands lighten the work.

A president who is pro-active with the board will do the following:

- Attend ALL council and district meetings that he/she is responsible for as stated in the bylaws. Here you will learn pertinent information and deadline dates for your unit from the

California State PTA. In addition, this is where a smart officer will become better acquainted with the bigger picture of what is available to bring back to the unit and participate by voting.

- Make sure that all officers on his/her board are trained by the local council or district leadership. Don't let anyone tell you that they already know how to do the job. Things are changing quickly. Trained officers make a strong board.
- Ensure that each member has a copy of the unit bylaws and becomes familiar with them. Refer to the bylaws during meetings to be sure the unit is following proper procedures.

- Be prepared with agendas, arrive early, and follow up with action items.
- Encourage registration for the California State PTA convention.

Strong board officers will:

- Attend all meetings thus helping ensure quorums to vote on business.
- Be prepared with secretary's or treasurer's reports monthly.
- Be prepared with motions and details to promote informed voting.

California State PTA Communicator, March 2007

Using the Volunteer Tally Sheet

Historian

The volunteer tally sheet helps the historian of the PTA/PTSA unit, council or district to collect the hours members expend in their PTA-related work and activities.

The best practice is to circulate this form during board meetings so each member can report hours. At the end of the PTA year, the unit historian reports the total volunteer hours in the Unit Annual Report and submits it to the PTA council and district. The council and district PTAs then include the reported hours in the annual reports to the California State PTA.

What hours should be included in the tally sheet?

Volunteer hours should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, phone, meetings, paperwork time. The hours after the school year ends through June 30th should be projected in the annual report.

Where do you report events and activi-

ties?

Events and activities during the year that benefit the children may be included in the narrative portion of the Annual Report.

Why do we collect and report volunteer hours?

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws.

The collection of hours is important in maintaining our federal tax exemption status. An organization granted nonprofit charitable status must receive one-third of its support from the general public.

In addition, information on this report is used for advocacy and program planning purposes.

Assessment of service hours spent in carrying out the purposes for which the organization was formed will positively affect the public support of PTA.

For more information, check the Toolkit or the website at www.capta.org.

California State PTA Communicator, March 2007



Save the Date!

June 7, 2008

Summer Leadership

Conference

See page 7!

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Parliamentarian

Sue King

Giving Notice of Meetings

Your PTA is having an association meeting next month and there are many items on the agenda for the members' consideration. What obligation does the executive board, especially the president, have to ensure that this information is provided in advance to the members of your PTA? These requirements can be found in detail in the *Bylaws for Local PTA/PTSA Units* (Article VII, Section 1), *Council Bylaws* (Article VIII, Section 1), and *District Bylaws* (Article IX, Section 1).

As a membership organization, it is the members who have the responsibility and authority to determine the program, budget and officers of the PTA. The program and budget include all programs, projects and expenditures of the PTA. Because all PTAs in California are constituent organizations of the California State PTA, a California corporation, all PTAs are governed by the California Corporations Code for the purposes of providing proper notice of meetings to members. The notice must include the following:

- date.
- time.
- place, and

- a list of all business that will be presented for action at the meeting. The notice must be provided *in writing* to all voting members no less than 10 days and no more than 90 days before the date of the meeting. Notice may be given through flyers, newsletters, bulletin board postings, U.S. mail, e-mail, or web site posting; however, if the Internet is used, the notice should also be provided in another manner, as some members may not have access to computer-generated notices. Written notice may take many forms, but it must be provided in a manner that provides a reasonable assurance that all voting members have received the notice.

Annual Election Meeting or Amending the Bylaws

At least 30 days prior written notice is required for the annual election meeting and any meeting where bylaws amendments will be considered. Bylaws amendments require the review and approval of the state parliamentarian before the 30 day notice may be delivered to the voting members. (See the last Article of bylaws and pages i-iii of bylaws for bylaws review and amendment adoption procedures.) The notice for the annual election meeting must

include a proposed slate of officers for the members' consideration. Nominations must also be taken from the floor at the election meeting. (See *Bylaws* Article – Officers and Their Election.)

Additional Considerations

PTAs must have the required quorum at meetings in order to legally conduct business. The quorum for a meeting is established in the bylaws with the caution that "if this bylaw provision authorizes a quorum of less than one-third of the voting power, then only those matters the general nature of which was contained in the notice of the meeting may be voted upon at such meeting." This, too, is California Corporations Code. Since virtually all PTAs state a quorum of less than one-third of the voting power, all PTAs are bound by this additional requirement. Items of business which were not in the notice may NOT be acted upon at that particular meeting, but may be discussed and placed on the agenda for action at the next meeting.

Source: *PTA in CA*, January 2006

Seven Reasons to Plan

Leadership Service

Seven reasons to plan:

1. To make things happen.
2. To provide a framework for decisions.
3. To reduce crisis.
4. To give direction to energy.
5. To grow in confidence.
6. To increase self-esteem.
7. To achieve goals.

What do you plan?

- Goals
- Programs
- Membership campaign
- Budget

Now is the time for newly elected PTA officers to plan for the next year.

California State PTA, *Communicator*, July 2007



Dads Make A Difference

Parent Involvement

Things Dad Can Do:

- Tell each of your children, "I love you, and I think you're absolutely terrific."
- Affirm your child with a hug, a kiss, a pat on the back, a squeeze on the neck, or some other appropriate physical gesture.
- Take your child to breakfast or lunch.
- Review your expectations for your child's behavior and ask yourself: Are they reasonable? Am I following through with proper guidance and support? Do I tend to defer supervision of my child to others?

- Tell your child some of the best advice you received when you were his or her age.
- Read aloud to your children every day, even when they are babies. Play and sing with them often.

How to Promote Father Involvement:

- Address questions and comments regarding the child to both fathers and mothers. If you do not see the father in person, make sure that notes home address both persons.
- Have parent conferences and meetings at times that both fa-

thers and mothers can be present. Basing your appointment exclusively on the time schedule of the mother can serve to exclude the father.

- Encourage both fathers and mothers to participate in child-centered activities offered through your organization.
- Do not force fathers to be involved. To foster a child's development, father involvement needs to be the desire of the father, and of the family as a unit. By pressing father involvement, you may actually serve to discourage it

California State PTA *Communicator*, March 2007

"Fathers leave an indelible mark on their children and society. We must encourage, equip, and support dads as they become the true heroes of the coming generation."

Ken Canfield, Ph.D. Founder, National Center for Fathering

Do You Know the PTA Difference?

Member Services

If you want other parents to become PTA members or increase their involvement, share this information with them.

While the term "PTA" is commonly used to describe any parent group, not all parent groups are the same. Here are some ways the Parent Teacher Association stands out:

- Founded in 1897, PTA is the nation's original and premier parent involvement group in schools.
- Local PTAs are supported by a national and state structure that provides valuable information, programs, resources, and training. This structure offers a network of support while leaving local units free to select the priorities, programs, and activities that address the needs of their schools.
- PTA believes parents are more

than fundraisers.

- PTA works with parents to advocate for proper funding, leadership, and instruction for all schools and school districts.
- PTA is a united national voice for children.

Not all decisions affecting a child's school happen at the local level, and the mission of PTA is to address the educational and social needs of all children. For more than a century, PTA has been a driving force in national education policies and programs. Today, PTA continues to champion the importance of family involvement; safe and nurturing environments; and proper funding, curriculum, and leadership in our public schools.

Learn more about the PTA difference—and tell others about it too!

Three Hours Can Make a World of Difference

By dedicating three hours of your time to your child's school over the remainder of the school year, you can help not only your child but all children in the school.

When parents are involved in their children's learning at home and at school, their children do better in school. And when families and schools work together, everyone benefits—from the children to the teachers to the parents to the broader community. PTA Three for Me improves communication, builds understanding, and strengthens partnerships between families and schools. The program spells out school needs and values parent contributions—big and small.

Reprinted from *PTA Parent* web-letter www.pta.org

California State PTA Convention 2008

Carolyn Epple

Ninth District PTA Convention Delegates Responsibilities

- I will attend the Ninth District PTA Orientation
- I will attend all workshops to obtain the training for which I have been sent to obtain
- I will attend all general meetings so that I am informed about the business of the organization
- I will read the resolutions prior to attending the general meetings, so that I am informed and can debate and ask questions, if necessary
- I will conduct myself according to the Professional Governance Standards adopted by my association and Ninth District PTA
- I will prepare a written report to give to my association board and to the association

Dear State Convention Delegates,

Congratulations on being elected as your unit, council or district delegate! I know that you understand that your responsibility to your unit, council, district is a serious one. They are paying from their budget for you attend convention; this is a privilege you have been offered.

As a delegate for Ninth District, take responsibilities seriously. I will have read the resolutions and will have asked our board to read them also, so that we may vote to determine if we are in favor or against them. I will attend the workshops for which I have registered. I will attend all general meetings. When I get home, I will file a report that confirms that I have met my responsibilities. I hope and expect that you will do all of this, too!

Our orientation meeting will be Tuesday, April 15, at 7:00 p.m. in rooms 401 and 402 at the San Diego County Office of Education. Mary Anne Tang is working hard to make this an enlightening and fun experience for you. Light refreshments will be served. I sincerely hope that you will be there. Much information will be given to you as voting and non-voting delegates. Ninth District PTA is here to support you. If you have any questions, please call me at 858-484-0867, or on my cell phone at 858-395-8384 or email at EVP9D@san.rr.com. I'm here to help with anything!

I'm looking forward to seeing you at orientation and convention!

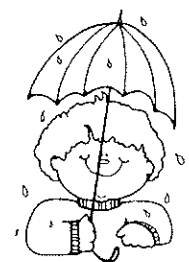
Financial Red Flags

- No treasurer's reports at executive board or association meetings.
 - Reports are given orally with written information to be provided "later."
 - Treasurer's reports list only general categories without sufficient detail.
 - Treasurer misses meetings and reports are not provided in his or her absence.
 - Bank statements sent to treasurer's or president's house rather than the school.
 - Only one person counting money; no cash verification sheets.
 - Only one person signing checks; only one person on bank signature card.
 - Signing blank checks.
 - Receipts not attached to Payment Authorization Form(s).
 - Inability of treasurer or chairman to say how much money the fundraiser made.
 - Unapproved budgets or yearly calendars.
 - Audits not performed as scheduled.
 - Bank statements not reviewed by a non-check signer.
 - Inquiry calls by concerned parents, teachers, or principal.
 - Board unfamiliar with unit bylaws payment authorization procedure.
 - Failure to provide a year-end audit on request.
- Financial Situations to Avoid**
- School staff member as treasurer or president.
 - Principal who wants projects funded without going through the approval process required by PTA.
 - Fundraising projects that will benefit a board member financially are strictly forbidden.
 - Encumbering future boards by

Leadership Service

- paying for salaries for on-going staff positions.
- President writes the checks because the treasurer has no experience, is unavailable, etc.
- Consistently paying per capita/insurance late or not at all.
- Lack of/incomplete minutes, particularly in matters involving use of funds; no motions releasing funds or approving expenses.
- Banks that do not return processed checks (or copies of such.)

California State PTA *Communicator*,
January 2008



Make a Splash in Long Beach

Carolyn Epple

Ninth District

PTA

everychild.one voice.

6401 Linda Vista Road, Annex A, San Diego, CA 92111 ■ (858) 268-8077 ■ Fax (858) 268-8017 ■ phoebe@sdcoe.net

Make a Splash in Long Beach

Saturday, May 3, 2008

7:30 p.m.

**Long Beach Convention Center
Room Location To Be Announced**

**Seated Dinner with Cash Beverage Station
Door Prizes Provided by Our Councils**

Reservation Form

Name _____

Address _____

City, Zip Code _____

Phone _____ Email _____

Unit _____ Council _____

Please secure the following reservations:

_____ @ \$40.00 each Amount Enclosed \$ _____

Names of Attendees: _____

Please choose the quantity of the following menu choices preferred by your attendees:

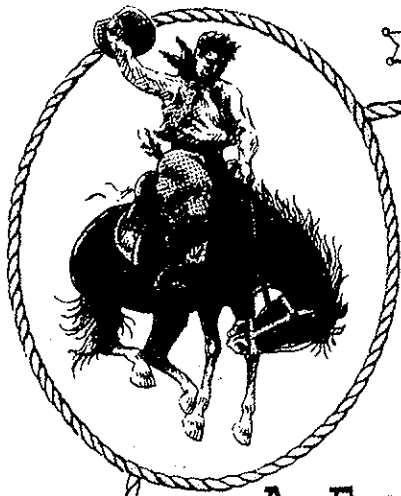
_____ Grilled Chicken Picatta with Mashed Potatoes and Julienne Vegetables

_____ Portobello Mushroom Lasagna with Bechamel Sauce and Seasonal Vegetables

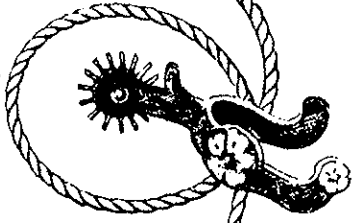
_____ Chipotle-Honey Glazed Pork Chop, Whipped Potatoes and Seasonal Vegetables

The entrees include salad, rolls, butter, choice of lemonade or iced tea, coffee and hot tea upon request, and dessert.

Order due date is April 25. Your order is confirmed when payment is received via online registration or at the Ninth District PTA office. All PTA checks must have two signatures.



Ninth District PTA Red Carpet Round Up



An Evening Honoring Award Winners

Awards will be presented for
Membership - Newsletters - Websites
Program Books/Directories - Reflections
Honorary Service Awards

Refreshments will be served
\$5.00 per person

Tuesday, April 22, 2008
7:00 p.m. - 8:30 pm
Balboa Park Club - Santa Fe Room
2150 Pan American Road West
San Diego, CA 92101
Please Respond by Friday, April 4

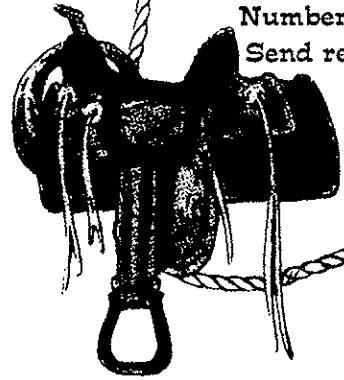
Name _____

Phone _____ Email _____

Unit Name _____ Council _____

Number Attending _____ Total Enclosed \$ _____

Send reservation form and payment to Ninth District PTA
6401 Linda Vista Road, Annex A, San Diego, CA 92111.
All PTA checks must have two signatures.



Save the Date!

Ninth District PTA Summer Leadership Conference

**Saturday, June 7, 2008
University of San Diego**

Registration Cost: \$30.00 in advance
Registration Cost after May 23: \$50.00

Includes:
General Meeting
3 Workshop Sessions + PTA en Español
Continental Breakfast and Buffet Luncheon
Exhibitors
and a beautiful Ocean View and Breeze!

Registration	7:00 – 8:30 a.m. (expanded hours)
General Meeting	8:30 – 9:00 a.m.
Session 1	9:15 – 10:45 a.m.
Session 2	11:00 a.m. – 12:30 p.m.
Lunch	12:30 – 1:30 p.m.
Session 3	1:30 – 3:00 p.m.
Session 4 (PTA en Español)	9:15 a.m. – 12:30 p.m.

Come and enjoy a day of important training and networking with your peers. All units should plan on sending representatives from next year's board.

More Information to come!

Ninth District PTA®

everychild.one voice.

“Celebrating 90 Years of Service”

California Congress of Parents,
Teachers, and Students, Inc.

National PTA

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Judy Williams Editor

Serving San Diego and Imperial Counties

Spanish Observer Offer:

For a **FREE** subscription to our Spanish *Observer* (one per PTA) call the Ninth District office: 858.268.8077

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Important Numbers

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Websitewww.ninthdistrictpta.org

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Email.....info@capta.org

Website.....www.capta.org

National PTA

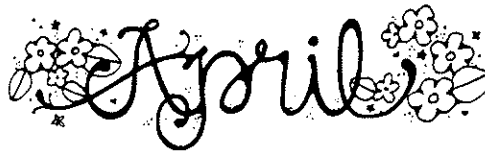
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Website.....www.pta.org

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IMPORTANT MEETINGS AND DUE DATES

Calendar of Meetings

- April 15 District Board meeting, 9:30 am, Mira Mesa Library
- April 15 Convention Orientation, 7 pm COE room 401-402
- April 17 Legislation meeting, COE room 508 @ 7pm
- April 18 Reflections Gala
- April 22 Red Carpet Round-Up, 7 pm, Balboa Park Club
- June 7 Summer Leadership Conference, all day, USD

Due Dates

- April/May Association officer list for 2008-2009 due to Ninth District PTA office through council, if in council. Check your bylaws for exact due date
- May 21 Annual Report with volunteer hours due to Ninth District PTA office, through council, if in council.

Save the Dates

- May 1 - 4 California State PTA 109th Annual Convention - Long Beach
- June 7 Ninth District PTA Summer Leadership Conference, USD
- June 21 - 23 National PTA Convention, San Diego, CA

