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## August 2024

*The Newsletter for PTA leaders in  
San Diego and Imperial Counties*

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**SCHOOL OF  
EXCELLENCE**

Congratulations to the following units on earning National PTA School of Excellence recognition:

**Avocado Elementary PTA  
Barnard Elementary PTA  
Chula Vista Hills Elementary PTA  
Palmer Way PTA  
Riverview International Academy PTSA**

Want to learn more about how your unit can become a School of Excellence? Enrollment for the 2024-2025 program is open now at [PTA.org/Excellence](https://pta.org/excellence).

**RUN YOUR PTA**



August has arrived and with it, many of the schools in our area are welcoming back students, while others have been in session for almost a month. Hopefully, you have had a chance to update the signers on your bank accounts and are ready to present or have presented the 2024-2025 Budget, the 2023-2024 End-of-Year Financial Report, and a treasurer report from the last association meeting to the end of the year and your July Treasurer Report to your association. Yes, you have been busy!

One way to ensure that your meeting minutes reflect the required information is to send that information to your secretary before the meeting or provide them with a written copy at the meeting. Meeting minutes should include the beginning balances in all accounts, expenses during the month, and the ending balance in all accounts. The ratification of check numbers and total expenses should also be included in the minutes. I always like to share income for the month as well. Remember you are reporting income and expenses for the month and your ending balance should include checks that the bank may not have processed. Your report should not be a restatement of the bank statement.

At each meeting, you should provide your financial reviewer or a board member who is not a signer on the account with the bank statement that shows you have reconciled the accounts. What does reconciled mean? It means that you have verified all deposits, that all the checks that the bank has processed are accurate, and you have noted any checks that were written that have not been processed by the bank, aka outstanding checks. Your reconciled balance is the bank balance minus the outstanding checks. The non-signer should sign and date the bank statement to verify that the information presented in your treasurer's report reflects what is on the bank statement. This verification is a requirement by the insurance company so we recommend completing it during the meeting when the reports are being presented.

Are you ready for the dreaded T? Yes, taxes are just a few months away for most of our units. Taxes and the RRF-1 forms need to be filed 4 ½ months after the end of the fiscal year. For most of our units that is November 15th, but check your bylaws to verify your fiscal year. If your unit has a gross income (Total income minus memberships pass-through) of less than \$50,000 your unit can file the 990-N, the 199-N, and the RRF-1 with the CT-TR-1 forms. To complete these forms you need your 2023-2024 End-of-Year Financial Report, your Bylaws and about 45 minutes to complete the filing. They are actually easy to complete and can all be completed online.

If your unit makes more than \$50,000 per year we recommend you find someone who is experienced in filing tax returns for non-profit organizations to complete the 990-EZ or 990 form and for the state, the 199 form. This person may also file the RRF-1 with the 990-EZ or 990 form attached, but if they do not, be sure that you complete them and send them in with the payment. The Registry of Charitable Trusts is part of the Attorney General's office and they assess late penalties that cannot be paid with PTA funds.

I have linked a [survey](#) for treasurers to help me plan and implement some training for treasurers in the next few months. If you need assistance sooner you can visit the Ninth District PTA [website](#) where you will find webinars on budgets, tax filing, and being a treasurer. If you need more assistance contact your council or myself at [treasurer@ninthdistrictpta.org](mailto:treasurer@ninthdistrictpta.org).

Remember to ask for help early...problems are easy to fix when they are new and small, the longer you wait the harder it gets to fix them. Have a great start to the new school year.

Deborah Childers, Ninth District PTA Treasurer



**Start Your 2024-2025 California State PTA MEMBERSHIP JOURNEY PASSPORT**

*Passport to PTA Membership*

**THE CHALLENGE**

**How Many Passport Stamps Can You Get?**

- TELL US YOUR THEME AND GOAL**  
All PTA units that forward\* their membership theme for the 2024-2025 membership year, along with a membership goal that reflects an increase over their final membership total from 2023-2024, on or before the deadline, will receive a digital badge celebrating their success and be recognized through California State PTA social media platforms. **Application is required. Due Date: 9/30/24**
- 100 DAYS @ 100+ MEMBERS STRONG**  
All PTA units that forward\* a minimum of 100 members on or before the 100th day of the 2024-2025 PTA term will receive a digital badge, be recognized on California State PTA social media platforms, and receive a ribbon at the annual Convention. **No application is required. Due Date: 10/01/24**
- READY, SET, REMIT**  
All PTA units that forward\* a minimum of 30 members on or before the deadline will receive a digital badge and be recognized on California State PTA social media platforms. **No application is required. Due Date: 10/30/24**
- 100% TEACHER MEMBERSHIP**  
All PTA units that achieve 100% teacher members and forward\* their membership on or before the deadline will receive a digital badge and be recognized on California State PTA social media platforms. **Application is required. Due Date: 11/30/24**
- HALFWAY THERE AWARD**  
This award is given to PTA units that have forwarded\* membership totals equal to or greater than their entire membership total for the 2023-2024 PTA term based on the December 2024 California State PTA Membership Report. PTA units will receive a digital badge and be recognized on California State PTA social media platforms. **No application is required. Due Date: 12/31/24**
- 10% STUDENT MEMBERSHIP**  
This award is given to PTA units that have forwarded\* student membership totals of at least 10% of total student enrollment (based on average daily attendance) on or before the deadline. PTA units will receive a digital badge and be recognized on California State PTA social media platforms. **Application is required. Due Date: 1/31/25**
- FOUNDERS' DAY MEMBERSHIP CHALLENGE**  
PTA Founders' Day is February 17. In celebration of our organization's founding members, we're challenging you to spread awareness beyond your typical campus reach. Whether it be a neighbor, friend, or small local business - anyone can join PTA and support your unit! Share your success stories and your thinking strategy for seeking hidden members on or before the deadline. PTA units will earn a digital badge and be recognized on California State PTA social media platforms. **Application is required. Due Date: 2/28/25**
- MEMBERSHIP MARCH**  
PTA units that increase membership over their 2023-2024 membership total will earn one of the following awards: **Bronze:** 1-35% increase; **Silver:** 34-60% increase; and **Gold:** 61-100% increase. Each unit will receive a digital badge indicating their award level and be recognized on California State PTA social media platforms. **No application is required. Due Date: 3/31/2025**
- 5 FOR \$500**  
Any PTA unit earning 5 of the incentives above on or before the deadline will be entered in a drawing to receive a \$500 cash award. They will also receive a digital badge and be recognized on California State PTA social media platforms. **No application is required. Due Date: 4/15/25**

\*Membership must reach the California State PTA office by the deadline. Visit <https://www.calptpta.org/2024/03/2024-2025-membership-journey-passport/> for application details.

## Membership

Membership is PTA's strength and our voice. We want all of our local PTAs to have the tools they need to increase membership. Please feel free to contact us if you have any questions.

California State PTA has announced their membership campaign. The membership incentives and challenges page has been updated on the Leaders website, Incentives and Challenges – California State PTA Leaders [capta.org](https://www.calptpta.org)

Congratulations to all of our units on your hard work. There are a lot of great things are happening, and we are seeing many of you that are reaching 100 members and more. KEEP UP THE GREAT WORK!

Lori Fentress, [member.services@ninthdistrictpta.org](mailto:member.services@ninthdistrictpta.org)

## The Corresponding Secretary

Some PTAs have a corresponding secretary, in addition to a recording secretary and financial secretary. Generally, but not always, this officer is appointed by the president subject to the ratification of the executive board (Bylaws For Local PTA/PTSA Units, Article V, Section 2).



The duties of issuing notices of meetings and conducting the general correspondence of the association are frequently assigned to the corresponding secretary.

When there is a corresponding secretary, the single word secretary refers to the recording secretary who records minutes of meetings.

Adapted from Robert's Rules Of Order, Newly Revised, 12th Edition (47:37)

Sue King, [secretary@ninthdistrictpta.org](mailto:secretary@ninthdistrictpta.org)  
2023-2025 Secretary



## Reflections

This year's National PTA Reflections theme is "Accepting Imperfection." It's an inspiring theme that offers a wonderful opportunity to showcase impressive art and literature. Reflections can be organized in various ways: teachers might integrate the theme into class assignments, PTAs could host an after school event, or students can work on their projects independently. Any form of participation that students choose will provide them with an opportunity to express themselves creatively.

Looking for a way to boost parent attendance at your PTA meetings? Use Reflections as your incentive. Who wouldn't be interested in seeing their child's artwork or dance performance? Start with your PTA business meeting and then dedicate the rest of the evening to showcasing student talent.

Here is a suggested timeline for the Reflections program. Since all entries must go up through channels, we recommend setting the unit deadline as October 1st if you are in a council, and November 1st for councils. For the Ninth District, the deadline is Monday, December 2, 2024. If your unit is out of council, your deadline is also December 2nd.

For all categories, guidelines and forms, please visit [PTA.org/Reflections](https://pta.org/reflections).

Cindy McIntyre, [reflections.chair@ninthdistrictpta.org](mailto:reflections.chair@ninthdistrictpta.org)  
Reflections Chair

## Leadership

### Recruiting Volunteers

It can be challenging to recruit volunteers. Find more information on PTA Leadership from California State PTA [here](#).

Here are just a few tips:

- Make sure your board has set goals that have been publicized to your school community. People are more willing to work toward a goal
- Ask people! Personally. Be honest when describing a position or project, including the time commitment. Match skills and interests to the job
- Be diverse and inclusive! Your board and volunteers should reflect your entire school community
- Be proactive! Reach out/contact potential volunteers. Offer a job to everyone who volunteers, providing options



tailored to his/her interests and availability

- Don't micromanage! Empower volunteers to develop their own strategies. "Thank you" are the two most important words in PTA
- Be open to, and encourage, new ideas
- Build a sense of camaraderie and teamwork. Have fun!



### California State PTA Annual Insurance Webinar

September 26, 2024 6:00-7:00pm

Make sure you sign up for California State PTA's annual **Insurance Webinar** on September 26. This is an essential event for all PTA leaders, providing crucial information and updates on insurance policies, worker's compensation, and best practices to ensure the safety and success of your PTA activities. And it's free!

One of the best things about being a PTA is you get comprehensive insurance at a low cost. The coverage is on a calendar year – starts in January and ends in December. The insurance your PTA purchased last year will cover your PTA's fall activities. Last year's PTA president should have received the *Certificate of Insurance* via email. If you need another copy, call AIM insurance at 800-876-4044. You can also download the [Insurance Guide for 2024](#).

In October, AIM will email each PTA with information on how to pay your 2025 insurance.

[Register Here](#)



### National PTA Grant Funding

Applications for funding to host a National PTA program are now open! Thanks to National PTA's generous sponsors and supporters, by answering just a few questions, your PTA/PTSA could be eligible to receive at least \$1,250 to implement a fun and engaging National PTA program focused on the arts, digital safety and well-being, healthy lifestyles and more! Learn more and apply now at [PTA.org/Grants](https://pta.org/grants).

Stay connected and follow us on social media!



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