

SHARE:

[Join Our Email List](#)

July 2024

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

Click Here to share this newsletter.  
Para leer in español Clic Aqui.

**Ninth District**  
**PTA**<sup>®</sup>  
*everychild.one voice.*<sup>®</sup>



Welcome to these units who were newly formed starting off their first full school year!

- Otay PTA February 2, 2024
- Freese PTA June 3, 2024
- DREAM Academy PTA June 6, 2024
- Joan MacQueen PTA July 8, 2024

RUN YOUR PTA



## How to start the year off as President!

Whether you are brand new to all of PTA or a president returning to PTA, there are procedures to follow to get started for a great year!

Check your home mail for the California State PTA "Leaders Welcome Packet"

<https://capta.org/resource/leaders-welcome-packet/>. This will give you all kinds of information. Does PTA have your mailing address? Enter your contact information into PTEZ or email it to us at [office@ninthdistrictpta.org](mailto:office@ninthdistrictpta.org) and we will be sure you are in the system!

Visit the California State PTA Leaders Website. <https://leaders.capta.org> Many of the resources you may be familiar with have been moved to this site. The unit number, which is needed to register, is on your membership card and in the upper right hand corner of your bylaws. Don't have either of these, send us an email at [office@ninthdistrictpta.org](mailto:office@ninthdistrictpta.org)!

Visit our YouTube channel, where you can watch the 3 hour president training video.

<https://www.youtube.com/user/NinthDistrictPTA> This will give you lots of information.

Read this old (but still very relevant) document on how to be a good president from the start.

[http://downloads.capta.org/con/handouts/2019/A01B01C06D06\\_PresidentsPart1\\_Handouts.pdf](http://downloads.capta.org/con/handouts/2019/A01B01C06D06_PresidentsPart1_Handouts.pdf)

Finally, have fun and remember it is all about the kids! PTA can be a lot of work, but if no one is having fun, others won't join and it will be TOO much work for everyone.



## Welcome Newly Elected Treasurers!

I would like to introduce myself as I too am a newly elected treasurer. My name is Deborah Childers and last year I was the financial reviewer for Ninth District PTA. In June I was elected to become the new Ninth District PTA treasurer. I have been treasurer for units and councils throughout my 20+ years in PTA but this is my first time as a district treasurer. I will be learning new things too!

Being the new treasurer can be a little daunting, but hopefully, the previous treasurer has passed on all the financial documents, procedures, and tips to help you get off to a great start. Here are some important items to work on before the school year starts.

Work with your president to contact the bank and find out what the bank requires to add new account signers, remove old officers, and update access to the accounts. Each bank is different so find out what you need to make

this a smooth transition. Most banks ask for signed meeting minutes for the election and bylaws. Be sure the bank does not offer you debit cards or credit cards. Unit and Council PTAs cannot have these as they violate the two signature rule.

Hopefully, you were able to work with your budget committee to get your 2024-2025 Proposed Budget approved. During the summer I recommend you meet with the committee to review your proposed budget and make any revisions. Your budget needs to be approved by the Association before funds can be spent, so if you were unable to meet and approve the budget before the end of the last fiscal year, you will need to do it at the first association meeting.

The treasurer has quite a few documents to present at the first association meeting so be sure to plan ahead to get everything ready. The list below will help you be prepared.

- 2023-2024 Year-End Financial Report ([the previous treasurer should have completed this](#))
- 2024-2025 Proposed Budget ([be sure to make motions to approve the budget, and release funds for fall events.](#))
- Treasurer Report from last Association Meeting to June 30th. ([Include beginning balance, income, expenses, and ending balance. This can be completed now](#))
- Treasurer Report from July 1 to present. ([Include beginning balance, income, expenses, and ending balance. Present does not necessarily mean the meeting date but should be close to the meeting date.](#))
- Make a motion to Ratify checks from the last association meeting to the present. State check numbers and total expenses.

Remember that as the treasurer you are responsible for ensuring funds are spent as outlined in the budget. You also need to be sure that the correct documentation with receipts is provided before checks are written and that all checks have 2 signatures.

The Ninth District PTA [website](#) has resources and [videos](#) to help you as you learn your new role. The [finance toolkit](#) is a great resource to help you do finances the PTA way. If you are not sure how to do something, do not hesitate to ask. It is always better to do it right the first time than to go back and correct it later.

Good luck and if you need any assistance be sure to contact your council or me at [treasurer@ninthdistrictpta.org](mailto:treasurer@ninthdistrictpta.org).



## Secretary

### Key Role – Secretary

The PTA/PTSA secretary is one of the three required officers of the association. The secretary is charged with several important roles:

- Take minutes at board and association meetings
- Co-sign authorizations for payment with president
- Handle PTA correspondence as directed by the president
- Maintain and preserve PTA records and important documents to pass on at the end of the term

### Getting Started

If using cloud storage get the password and ID to access records. Review files and procedure book (hard copy or virtual documents) from last term to better understand the scope of your new position. Materials should include:

- Secretary's minute book with minutes from board and association meetings
- PTA records – bylaws, membership list, charter, rosters and correspondence

If the PTA has a recording secretary and a corresponding secretary, discuss how to work together.

Sue King.  
[Secretary](#)



### MEMBERSHIP TOOLBOX FOR PTA LEADERS

If you haven't started planning your membership campaign yet, now is a great time to begin! Need new ideas to get more PTA members at your school? Wondering how to get students or teachers more involved in the PTA? Check out the [Membership Toolbox](#) for some awesome resources!

Questions please contact Lori at [member.services@ninthdistrictpta.org](mailto:member.services@ninthdistrictpta.org)



### Financial Reviewer

Unlike other officers, Financial Reviewers have a unique role that extends beyond the end of the fiscal year (for many units that is June 30th, but check your bylaws). The Year-End Financial Review hinges on the treasurer closing the 2023-2024 financial books by the end of the fiscal year. Ideally, your committee was appointed earlier and has a scheduled review session. If a Mid-Year Financial Review was completed, the focus will be on documents since then. (For many units this is January 1 to June 30th; otherwise, it spans the entire fiscal year. Check your bylaws for your fiscal year.)

In the event the 2023-2024 Financial Reviewer cannot complete the review, a new reviewer may step in, provided the majority of the committee members weren't account signers. If you lack a review committee, contact your council or Ninth District PTA for guidance. There are also resources available on Ninth District and CAPTA websites, including a helpful video on the review process.

Ninth District PTA had a minor shuffle of officers starting on July 1st. Deborah Childers will be the Treasurer and David Rogers was elected to be the new Financial Reviewer. You will be able to contact David at [financialreviewer@ninthdistrictpta.org](mailto:financialreviewer@ninthdistrictpta.org).



### National PTA Dues to increase by \$1.00 starting in July 2025

Delegates to the National PTA Convention in June voted to increase the National PTA dues rate by \$1.00, from \$2.25 to \$3.25. This increase will go into effect on July 1, 2025. This is the first increase in National

**PTA dues in 13 years.**

**This increase will not affect members who join this school year - 2024-2025. Information will be coming soon to help you prepare for this dues increase.**

**In the meantime, all units should take note in planning their future membership fees, and in potentially updating their current bylaws.**

## Community Resources & Upcoming Events



### Summer activities at San Diego Libraries

As San Diego sizzles under the summer sun, the county is shining a spotlight on a wealth of activities available at local libraries. From musical performances and puppet shows to magic acts, puzzle sessions, and thrilling escape rooms, San Diego County Libraries offer something exciting for everyone this summer. The Summer at your Library program runs until Aug. 31, providing parents with ample opportunities to keep their kids entertained until school resumes.

For a detailed list of events at different branches across the county, click [here](#).



### SDCCU BIZ KID\$ SUMMER SERIES

FREE Webinar Series to help Teens learn Financial Literacy

San Diego County Credit Union® (SDCCU®), one of Southern California's largest locally-owned financial institutions, is hosting a virtual SDCCU Biz Kid\$ Summer Series to help engage kids during summer break. The series of presentations provides fun and interactive ways to learn about money and business. Topics include: My First Credit Card, Crash Course on Starting a Business and Are You Financially Literate? These Biz Kid\$ webinars will be held weekly on Wednesdays throughout the month of July.

To register, <https://sdccu.com/about/community/sdccu-biz-kids/>.



**Movies Under the Stars – Coming to a Neighborhood Park Near You!**

Summer Movies in the Park is the largest free and family-friendly outdoor movie series in San Diego County, with dozens of hosting sites and over a hundred screenings. To learn more visit [www.summermoviesinthepark.com](http://www.summermoviesinthepark.com)

Stay connected and follow us on social media!



6401 Linda Vista Rd., Annex A  
San Diego, CA  
92111 • (858.268.8077)  
[www.ninthdistrictpta.org](http://www.ninthdistrictpta.org)

Ninth District PTA Linktree

Ninth District PTA | San Diego County Office of Education 6401 Linda Vista Road, Annex A |  
San Diego, CA 92111 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!