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Save the Date! 🍩

Ninth District PTAs Summer Leadership Conference

📅 Saturday, June 7, 2025

📍 Location:

Joan B. Kroc Institute for Peace and Justice,
University of San Diego
5555 Marian Way (Underground Parking Structure)
San Diego, CA 92110

Enjoy a day filled with workshops, registration, meals, and exhibitors—all in one sweet location!

REGISTER



¡ATENCIÓN LÍDERES QUE HABLAN ESPAÑOL!

JOIN US AT THE SUMMER LEADERSHIP CONFERENCE

We're offering Spanish interpretation for the General Meeting and these key workshops:

- *President*
- *Treasurer*
- *Secretary*
- *Membership & Marketing*
- *Reflections*
- *PTA 101*
- *Parent Rights & Self-Advocacy*
- *Culture & CommUnity*
- *Building a Budget*
- *Programs*
- *Empowering Your PTA to Build Partnerships*



Look for workshops marked with an "I" on the registration form.

We encourage Spanish speaking board members to attend our Summer Leadership Conference, and we have scheduled interpretation for the General Meeting and the following workshops: President, Treasurer, Secretary, Membership & Marketing, Reflections, PTA 101, Parent rights and self-advocacy, Culture and CommUnity, Building a budget, Programs, and Empowering your PTA to build partnerships. Please see the workshops with an "I" on the registration sheet and the workshop descriptions on the website linked here:

[Workshop Descriptions \(English\)](#)

[Workshop descriptions \(Spanish\)](#)



Treasurer

The end of the year is just around the corner! For units with a fiscal year-end of June 30th, it is a good time to begin getting your books ready for closing out the 2024-2025 fiscal year. This way, you will be ready to prepare the following year-end reports.

- Year-End Financial Report and upload to myPTez
- File your 990N, 990-EZ, or 990 with the IRS
- File your 199N, or 199, with the California State Franchise Tax Board
- File your RRF-1 with either the CT-TR-1 or 990 form

I bet some of you did not know it is the responsibility of the outgoing treasurer to file these at the end of their term because many of you filed them at the beginning of your term for the last treasurer. To be honest, there is no reason to wait until November 15th to file your forms. But wait, shouldn't we complete the financial review first? You could.. but if there are findings that impact the financial amounts you submitted, the new treasurer can file an amended return. So here are some suggestions on how to get ready...

- Are your bank balances reconciled? Do you have outstanding/uncleared checks?
 - If you have outstanding checks, contact the person or vendor and ask them to deposit them. You may need to put a stop payment on a check and reissue it. It is best to clear these up before the end of the fiscal year. I have seen units carry outstanding checks for years, and it just messes up their year-end balances.
- Review your income and expense categories. When filing the CT-TR-1 or 990 forms, the income and expenses are reported by categories. Having them organized ahead of time will help you complete the forms more efficiently.
- If your 3-year average income is greater than \$50,000, we recommend hiring someone to file your 990-EZ or 990 form. Begin looking for someone so you can turn your records over after the end of the fiscal year.
- If your 3-year average income is less than \$50,000, the 990N, 199N, RRF-1 with the CT-TR-1 take less than an hour to complete if you have your Year-End Financial Report completed. [Here is a video](#) that will walk you through all the filings.

If getting ready to file and filing forms is stressing you out, come to the Summer Leadership Conference on June 7th. There will be workshops on budgets, tax filings, treasurer tips, and more! If you cannot make the conference, contact your council or me for assistance!

Deborah Childers, Ninth District PTA Treasurer
treasurer@ninthdistrictpta.org

Parliamentarian

Parliamentarians (Unit/Council) and Presidents, please take note of some important updates from the California State Parliamentarian

First, there are a LOT of bylaws in the queue that still need reviewing at the State level. Please bear with us as they work through the backlog. For the past month, there have been around 100-110 bylaws in queue every week! It's a daunting job to review and respond to all those bylaws. We understand that it's near the end of the fiscal year (and school year), and that you have Association meetings that are either coming up very soon, or may have already passed. We'll get the bylaws back to you as soon as possible.

There are some additional changes you should be aware of regarding bylaws.

Minimum Quorum Change

There have been several changes to bylaws as of late, some of which have already rolled out (such as the ability to strike the historian position), and some of which have not (such as the removal entirely of the corresponding secretary position, which will be part of the 2025 bylaws template update - NOT YET FINALIZED). We also recognize that it is getting harder to fill and staff large executive boards, and that there are many boards running with just the president, treasurer, secretary, teacher representative, and principal. Therefore, the minimum quorum for the Executive Board has been reduced to 4. The formula to calculate remains the same - it is still a simple majority of the executive board as defined, but now the minimum is four instead of five. This is now in effect, so bylaws submitted can reflect the new minimum quorum if applicable.

Updated Bylaws Submittal Form (Including Debit/Check Card Language)

Available to review with the "O1 - Bylaws Submittal Form" is a document describing debit/card options. At the February Board of Managers meeting, a debit/check card policy for units, councils, and districts

was adopted for addition to the Toolkit. The adoption of this policy incorporates mandatory standing rules for constituent organizations regarding the use of the card. The updated O1 bylaws template version reflects a spot to check off if the organization will use a check/debit card so that the state parliamentarian can attach the mandatory standing rules to align with the new policy. Please let me know if you need the updated O1 bylaws template, and incorporate its use moving forward.

Updated Unit/Council/District Instructions

The unit/council/district bylaws instructions have been updated to reflect the minimum quorum change. These handouts are available on the Intranet and in the district drive return folders. PLEASE USE THESE AND DISTRIBUTE THESE TO LEADERS. The fewer errors that are made in bylaws, the less time it takes to approve them and get them back to you.

Queue Update

The bylaws review queue is live, and has been reformatted to account for the influx in bylaws. You will notice that the dates are missing now, and that is in large part because the formula was throwing errors when there were more than 50 bylaws in queue instead of working through the bylaws instead.

Bylaws Templates and Submissions

The eBylaws system is down and will remain so for the foreseeable future. We are aware that for some reason the system is still accessible (it isn't supposed to be). Do not submit bylaws that have come from the eBylaws system. How can you tell? The year watermark on the front cover of the bylaws will look like it is in a Times New Roman/Times Roman style font, instead of the broad, sans serif style font on the fillable templates. Only fillable templates can be used.

Speaking of the the fillable PDF templates, do not alter the templates. Please advise all unit leaders and parliamentarians to not alter the templates. Do not add language, do not change verbiage. Use the fillable fields only. Do not alter the fillable fields. Please use the templates as they were provided. If additional changes are needed, use the space in the bylaws submittal form to indicate what changes are needed, and provided they are permissible, they will be considered. Add an extra (separate) Microsoft Word doc to the submission if you need to explain anything in greater detail. This helps me get bylaws back to you faster.

Shout out: Come to the Parliamentarian sessions at the Summer Leadership Conference. Tell your incoming Parliamentarian about SLC and tell them to attend as well!

Thanks,

Bruce, parliamentarian@ninthdistrictpta.org



Important Reminders

Before you say goodbye at the end of the school year, please do the following:

1. Turn over your procedure book to the incoming officer. It should contain board rosters, bylaws, meeting calendar, budgets, and agendas and minutes from previous meetings. If you were not handed a procedure book at the start of your term, please start one and give it to the officer taking your place.
2. Share or forward any passwords to Google drives, email, and social media so the incoming officers don't have to hunt them down.
3. Outgoing treasurers should make plans to reconcile the books one final time after the June bank statement, schedule a financial review and then complete the tax filings.
4. Schedule a board meeting for the incoming board to plan, budget, etc. This will allow you to get a jump start on your membership campaign and other things that should be ready to go before the first day of school.
5. Schedule a clean out of all supplies, especially food and drinks and all refrigerators/freezers owned or used by the PTA. A lot of schools have scheduled downtime when they may shut off the power. Do not leave sugary drinks or snacks that can attract bugs or rodents.
6. Have a great summer!



Secretary and the End of the Term

At the end of the term, the master copy of the minutes from board and association meetings should be bound and passed on to the newly elected secretary. Minutes are the legal, permanent records of a PTA/PTSA as a nonprofit organization and are kept forever – in case of a question in the future about how money was spent or other executive board/association actions.

In accordance with guidance in the California State PTA Toolkit, materials used to perform a PTA financial review are listed on the Financial Review Checklist and include:

- Financial records, books and reports
- Approved meeting minutes
- Unit Bylaws and Standing Rules
- State and federal government tax filings and report forms

Work closely with the board to identify a date to collect the required records. Don't let the secretary minutes become a finding in the financial reviewer's report.

Adapted from Job Descriptions of Secretary and Financial Reviewer, California State PTA Toolkit

Sue King

Secretary@ninthdistrictpta.org

San Diego Regional Youth Leadership Forum (YLF) 2025

August 4-6, 2025. San Diego State University. Open to all ages 16-21. No Cost to Attend. Food is provided. Free parking available. To learn more visit <https://www.dor.ca.gov/Home/RegionalYlfEvents>

Link to application <https://forms.office.com/g/NRUsjrk5Jk>.



Walmart Business

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Walmart Business is a dedicated site and e-commerce experience designed to help organizations - like local PTA units - save time, money and hassle with their purchasing. By providing a free, one-year Walmart Business+ membership, PTA units nationwide can shop for, and order needed supplies for classrooms, teachers and their schools with access to savings benefits such as 2% rewards on orders of \$250 or more and free shipping with no minimums. You'll also save on purchases through Walmart's everyday low prices and by using your tax-exempt status.

[Create an account](#)
[FAQ](#)

Historian

History heroes, UNITE! It's time to ROCK our PTA dedication! Historians, activate your inner record-keeping superheroes and GRAB those volunteer hours from your boards! URGENT ALERT! Those incredible hours were due on May 1st, 2025! If you haven't sent them in, JUMP TO IT NOW! Remember, we're capturing every amazing moment from July 1, 2024, to June 30, 2025 – so a sprinkle of future-telling is welcome! Let's SHOUT about our unstoppable commitment! Let's MAKE HISTORY!

Questions? Dive into the past (and future) with Sonya Vargas historian@ninthdistrictpta.org



[Historian Resources](#)
[Fillable pdf Historian Report](#)
[Volunteer Tally Sheet](#)

School Spotlight



Great job to Olivewood Elementary PTA for their work on community engagement at their school. Providing support for a school garden and working with their administrators to create fun and engaging events.



Vista High PTSA and Vista Unified Special Education PTA were proud sponsors of the Vista High School Character Leaders 2025 Buddy Prom. They had a great turnout of students from across the Vista Unified School District. President-Elect Anne Emfinger was honored to attend this amazing event.

Want to be featured in our next newsletter or social media?

So many of our Units and Councils are doing great things in their communities! Share with us some images and a short blurb about what positive things your PT/PTSA is doing for a chance to be featured in our next newsletter or social media. Email Jemima Dutra, Ninth District PTA Communications Director at communications@ninthdistrictpta.org

How did you like this newsletter?



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