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October 2024

The Newsletter for PTA leaders in San Diego and Imperial Counties



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President's Message

Although this is the scary season, don't let it affect your volunteering! PTA shouldn't be scary.

I have been very busy this month assisting PTAs throughout San Diego and Imperial Counties with various issues. A common problem is volunteers. Mainly, not enough of them! This shouldn't mean that you make yourself or your family miserable because you are trying to do too many things. Remember this when you are trying to recruit new volunteers as well. Try to break up tasks so they are manageable and fun! Then you will have enough volunteers to help with the boring tasks and the fun ones!

The amount of your time, talents or treasures you have to share changes throughout your life. It is great to say yes to volunteering, but if circumstances change, be sure to communicate to others that things have changed. Many of us were raised that "quitting" is failing, but it is also a valuable lesson to admit when you need help. It may seem easier to just do it yourself, but that makes it difficult for others to help when needed, and it also prevents new volunteers from contributing and eventually taking on the task.

Finally, I am often contacted about sharing information about other organizations that provide services to the education community. We share some of these events via our social media channels. We also provide links on our [website](#), under the community resources tab. We will occasionally highlight some in this newsletter. Pick how you share your extra resources carefully, because ideally they will provide benefits to you as well! All you have to do is search, "benefits of volunteering" and you will find many articles and resources extolling the benefits to YOU, the volunteer! Volunteering is a treat, not a trick!

Shawna Straw
president@ninthdistrictpta.org

RUN YOUR PTA



Ninth District Program Grant Applications are now open!

Program Grants to unit and council PTAs/PTSAs to implement programs or events that support the PTA's mission statement and goals. Please apply - it's easier than you think!

Deadline: Wednesday, November 20, 2024. Please complete the [Digital Application Form](#). *You will need to create or log into a google account to access the digital form.

Additionally, you can print out the application form in [English](#) or [Spanish](#) and submit it.

For Information questions or more information please contact Mary Patterson.

Mary Patterson
communityconcerns@ninthdistrictpta.org



Get ready for Taxes and Financial Reviews

Treasurers, you are halfway to your mid-year financial review. I recommend looking over the financial review [checklist](#) to ensure you have been following all PTA procedures so that you are not scrambling in December to get your books organized. Two typical findings during financial reviews relate to bank reconciliations and signatures. Make sure you are reconciling your bank statements and getting a non-signer to review and sign the bank statements. Also, be sure all payment authorizations have the president and secretary's signature and the date it was approved in the meeting minutes.

I will be hosting a **treasurer training** with a question and answer session on Tuesday, October 22nd at 10:00 AM at the San Diego County Office of Education in room 301. This will be an in-person training. I will also host a

virtual training session on Tuesday, October 29th at 6:00 PM. Both trainings will be about an hour with additional time for questions. Topics will be financial procedures, budgeting, and uploading documents to myPTEz. Please RSVP with this [form](#).

Finally, did you know when the PTA receives **donations** through Totem or PayPal your PTA needs to claim the amount donated and then record the bank fees separately? For example, if someone donates \$30.00 when they sign up for membership with Totem, Totem distributes \$28.50 to your PTA but keeps \$1.50 (5%) as a fee. Your PTA must record the \$30.00 donation as income and \$1.50 as a bank fee expense. The 5% Totem fee and the fees charged by PayPal need to be recorded as expenses and recorded separately from the donation. The \$1.00 Totem charges per membership does not need to be tracked by your PTA because the member paid that fee.

Deborah Childers

treasurer@ninthdistrictpta.org



Know your Check Signers and Non-Check Signers

Every PTA/PTSA should have designated check signers and non-check signers. The check signers are listed in your bylaws by title - usually the President, Treasurer and one or two other Elected Officers. The non-check signers are not listed in your bylaws but they play an equally important role: review and sign off on the monthly bank statements and bank reconciliations. Often the non-check signer is the Financial Reviewer. If your PTA/PTSA hasn't designated a non-check signer to do this monthly task, put this on your next board meeting agenda. This will help prevent the insurance company from denying any bond claim. Click to [learn more](#).



Secretary

As one of the three required officers for a PTA/PTSA, the secretary plays an important part in running the PTA/PTSA. One main task is to provide concise and complete minutes for Executive Board and Association meetings. It's always best to complete the minutes soon after a meeting. Minutes are not to be posted on a website, social media, newsletter or school bulletin board; however, a summary could be posted.

Sue King

2024 Insurance Webinar



In case you missed the California State PTA Annual Insurance Webinar with AIM Insurance, the recording is now available! Watch the full [2024 Insurance Webinar](#) to hear important information regarding insurance policies and services designed to protect your PTA/PTSA and support your activities. During the webinar, you'll learn about insurance coverage, changes in benefits, the renewal process, the workers' compensation form, incident reporting forms, deadlines, and more.

October

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Historians
Don't forget to track your hours!

Historian

The Historian position has always been a great starting point for new board members ready to learn and help on a PTA/PTSA Board. I would like to remind everyone to please continue to collect hours every month and to not wait until the end of the year. Collecting the hours for the Unit/Council records is a good way to show your school and/or school district how many hours the PTA/PTSA volunteered for them and saved them money during a school year.

Sonya Vargas
Historian@ninthdistrictpta.org

Ninth District PTA
every child, one voice

SAVE THE DATE

WEDNESDAY, FEBRUARY 26, 2025
ANNUAL MEETING & FOUNDERS' DAY

This event will be held at the Sharp Prebys Innovation and Education Center.

Mark your calendars and look for more details and registration coming soon!

IT Volunteer Needed

Ninth District is looking for a volunteer to be our IT Consultant and manage our Google Workspace account and website. We have a WordPress website hosted on a

DreamHost DreamPress server. Duties include user management, hosting administration, support to President and other Ninth District PTA officers, and assisting with content. Google Workspace duties include navigating and using the Admin console, user account setup and email management for Ninth District PTA officers.

Please [contact us](#) if interested.

**Volunteer
NEEDED**

Volunteer IT Consultant

- Manage Google Workspace account and WordPress site on DreamHost DreamPress.
- Duties: user management, hosting admin, support to President and officers, content updates.
- Google Workspace: Admin console navigation, user account setup, email management.



Training & Resources

Here are some valuable resources for Units and Councils

There are lots of training resources available for local PTA/PTSA leaders:

National PTA: pta.org

California State PTA Website: capta.org

California State PTA Online Toolkit: toolkit.capta.org

California State PTA Leaders Website: <https://leaders.capta.org/>

Ninth District PTA:

<https://www.ninthdistrictpta.org/>

<https://www.ninthdistrictpta.org/leadership-resources/>

Ninth District PTA YouTube Channel:

<https://www.youtube.com/user/NinthDistrictPTA>

Questions? Please contact Anne Emfinger

leadership@ninthdistrictpta.org

Stay connected and follow us on social media!



Ninth District PTA Linktree

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