

SHARE:

[Join Our Email List](#)



## September 2024

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

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



### President's Message

There are so many resources for you as a PTA leader! This newsletter is only one of them!

Follow us on [social media](#) to get fun shoutouts for PTAs with membership accomplishments, hear about upcoming events and to share YOUR PTA activities with us! Have you been seeing the birthday posts, celebrating many, many years of PTA in San Diego and Imperial Counties?

The benefit of being part of PTA is the resources, but they only help if you have them! I still find things I forgot I knew when I am looking for a resource to answer a unit question. Please keep reading this newsletter to start (or continue) your PTA learning journey.

# RUN YOUR PTA

**Treasurer's Reminders**  
SEPTEMBER 2024

**Budget Category**  
Each income category should have an expense category.

**Expenses & Approval**  
Expenditures must be presented to the Board and approved before money can be spent.

**Tax Filings**  
Did your fiscal year end on June 30th? Filings & RRF-1 are due November 15th. Do this early! Don't wait!

**Questions?**  
Contact your Council Treasurer or Deborah Childers.

TREASURER@NINTHDISTRICTPTA.ORG

## Treasurer

### Tackle Taxes & Budgets Like a Pro: Simplifying Your Financial To-Do List!

Thank you to everyone who completed the Treasurer Training Survey. I will be scheduling some training and for those who asked some specific questions I will email you some information as well. If you did not get a chance to complete the survey, here is the [link](#).

This month I would like to share some resources and reminders for treasurers.

PTAs use a gross income and gross expense bookkeeping system. This means that there should be an expense category for each income category (fundraiser, program, etc). This is important for reporting gross income for taxes. Here is a link to [Budgeting guidelines](#). Remember if you amend your budget it will need to be approved by your executive board and then approved by a two-thirds vote at the next association meeting.

Did you know that even after your budget is adopted by the association that the board still needs to authorize all expenditures before money is spent? Your Board should approve your budget, then the Association adopts your budget, and the funds should be released. That does not mean board members or committees can start spending money. Planned expenditures must be presented to the board in a meeting where quorum is present. An adopted motion authorizing the expense must be documented in the minutes, and then money may be spent! (And don't forget a Payment Authorization form and backup documentation for every expense is required!) So protect yourself and your PTA funds and be sure to follow the guidelines. Here is a link to an [expense process graphic](#), the [Income and Expenses](#) and the [Toolkit, Finance Section](#).

For units whose fiscal year ended June 30th, your tax filings and RRF-1 filing are due November 15th (4 ½ months after the end of the fiscal year). Hopefully, your financial review is completed, but you can file your taxes before if necessary. Your financial review does help to ensure that you will not need to amend your filings. If your unit's 3-year average of Gross Income is less than or equal to \$50,000 here is a [video](#) link that will walk you through the process of filing a 990N, 199N, RRF-1 and CT-TR-1. If your unit's Gross Income is greater than \$50,000 you will need to file 990EZ or 990, 199, and RRF-1 (instead of the CT-TR-1 you will submit your 990EZ or 990 form with the RRF-1). Ninth District PTA recommends hiring a tax professional to complete the 990EZ or 990, and 199 forms. Do not wait until November 15th to start filing!

Finally, if you have an immediate need for help please be sure to contact either your council treasurer or myself. You do not have to wait for a training session to solve a problem.

Deborah Childers - [Treasurer@ninthdistrictpta.org](mailto:Treasurer@ninthdistrictpta.org)



### Secretary

Consider the following on how to be the best secretary for the PTA

- Understand the PTA's mission and goals
- Secretary is responsible for maintaining records
- Develop strong skills to keep track of minutes
- Communicate effectively with board members, volunteers
- Pay close attention to detail when handling documents
- Accuracy is crucial in maintaining the integrity of the association's records
- Respect the confidentiality of sensitive information discussed in meetings
- Be familiar with software and tools used for document management and communication
- Attend board meetings and accurately record minutes to document decisions and action items
- Work closely with other board members and volunteers to support the association's mission

PTA Units often face changing priorities and unexpected challenges:

- Be flexible and adaptable in approach
- Show dedication to the association's mission and goals through actions and attitude.
- 

By embodying these qualities and skills, you can make a valuable contribution as the secretary to the PTA.

Sue King, [secretary@ninthdistrictpta.org](mailto:secretary@ninthdistrictpta.org)



### Reflections

This year's National PTA Reflections theme is "Accepting Imperfection." Ninth District PTA will be hosting a virtual workshop to help answer questions and help you get started. The training will be held on Thursday, September 26th at 6pm

Topic: Reflections Training for Councils and OOC  
Time: Sep 26, 2024 06:00 PM Pacific Time (US and Canada)  
Join Zoom Meeting  
<https://us02web.zoom.us/j/88149543053?pwd=ATCRHA2Tn8Od6SgDEpIF7P7yeAHf91.1>  
Meeting ID: 881 4954 3053  
Passcode: 244737

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

### Membership



Congratulations to PTA's that have [already exceeded their total membership from 2023-24!](#)

\*The results are all members July 1 – August 31, 2024 plus Totem members Sept 1 – 16, 2024.

### SAVE THE DATE!

Ninth District PTA's Annual Meeting & Founders' Day celebration. Wednesday February 26, 2025 at Sharp Prebys Innovation and Education Center. Mark your calendars and look for more details and registration coming soon!



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



## How Do You Stay Informed on Upcoming PTA Trainings and Events?

Keeping up with PTA trainings and events is crucial for staying engaged and making the most of your PTA involvement. Here are some effective ways to ensure you're always in the loop:

**Submit Your Roster:** We're actively seeking rosters for PTA boards. To facilitate the flow of information, please provide us with the names, mailing addresses, and phone numbers of each officer. You can either input this information directly into myPTEZ or email your roster to the office. By doing so, you'll receive newsletters packed with details about upcoming trainings and events.

**Access EZ for Contact Management:** If your PTA does not use myPTEZ for accounting but still needs to manage contacts and upload documents, you can request a login for EZ by emailing the office ([office@ninthdistrictpta.org](mailto:office@ninthdistrictpta.org)). This will help streamline your communication and keep your records up-to-date. myPTEZ for uploading rosters and documents is free but if you wish to add on the accounting program there are different options to choose from. <https://www.myptez.com/>

**Utilize Our Website:** Another valuable resource is our [Ninth District PTA website](#). Here, you can find links to essential resources and updates about PTA activities. Make sure to visit regularly to stay current.

**Follow Us on Social Media:** Stay connected and informed by following us on [Instagram](#) and [Facebook](#). Our social media channels are regularly updated with the latest news, event announcements, and useful tips.

By staying connected through these channels, you'll ensure that you're always up-to-date on the latest PTA opportunities and events.

## 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.

**BOOST YOUR  
IMPACT WITH  
PROGRAM FUNDING**

Get the support  
your PTA needs  
**Apply Now!**

PTA.org/Grants

## 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).

### Programs for All Ages

- PTA Healthy Minds, Sponsored by the New York Life Foundation
- Mary Lou Anderson Reflections Arts Enhancement, Sponsored by the Family of Mary Lou Anderson
- PTA Wellness Fairs, Sponsored by Walmart
- PTA Connected: The Smart Talk, Sponsored by Norton (Part of Gen)

### Programs for High School

- Healthy Bodies Tobacco Prevention Campaign, Sponsored by The Campaign for Tobacco-Free Kids
- PTA Connected: Build Up and Belong, Sponsored by Discord
- PTA Connected: Digital Online Safety Program, Sponsored by TikTok

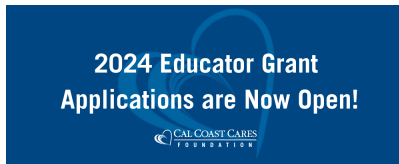
### Programs for Middle School

- Healthy Bodies Tobacco Prevention Campaign, Sponsored by The Campaign for Tobacco-Free Kids
- PTA Connected: Be Internet Awesome, Sponsored by Google + YouTube

### Programs for Elementary School

The latest news for you

- STEM + Families Propelling Our World, Sponsored by Huntington Ingalls Industries
- STEM + Families Science Festival, Sponsored by Bayer Fund
- PTA Connected: Be Internet Awesome, Sponsored by Google + YouTube
- PTA Connected: Ready, Tech, Go!, Supported by AT&T



### Educator Grant

Are you or someone you know an educator in San Diego or Riverside County? The Cal Coast Cares Foundation is now accepting educator grant applications from local educators in K-12 public, private or charter schools, community and state colleges/universities in San Diego or Riverside counties to support special classroom projects related to any of the STREAM fields (Science, Technology, Reading, Engineering, Arts, and Math).

This year, Cal Coast is proud to offer up to \$75,000 in grant funding for educators! Educators who are selected will receive a grant in the amount of \$500-\$2,500 to inspire innovative learning in the classroom. [To see the full list of eligibility requirements, please click here.](#)

For questions or information about the Educator Grant program or how you can support the Cal Coast Cares Foundation, please contact [foundation@calcoastcu.org](mailto:foundation@calcoastcu.org).

Stay connected and follow us on social media!



Ninth District PTA Linktree

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

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!