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Welcome Back!

I don't know where the summer went, but I hope you were able to take some time to relax, rest, and recharge. As students are coming back to school and PTAs are getting things running for the term, I am excited to see all the fun and amazing things happening on campuses across Ninth District.

This monthly newsletter is full of resources and information for PTA leaders and supporters alike. I encourage you to take a few minutes to read through it. Please know Ninth District PTA is here to help and support all the unit and council PTA in San Diego and Imperial Counties. We are only a phone call or email away. I look forward to meeting you and working alongside you this year.

-Anne Emfinger, President
president@ninthdistrictpta.org

Quick Links:

Register for
Leader Lab

Treasurer Huddle -
August 13, 2026 @
6:00 p.m.

Treasurer Huddle -
August 24, 2026 at
10:00 a.m.



Welcome and thank you for working to improve the lives of children, youth and families in your community by supporting PTA!

Hopefully you are working to stay aware of all the ways people trying to scam you can sneak into your life. Your PTA life is as good a place as any, unfortunately, CBS News 8 just did a story about the increase in people being contacted by what appears to be a legitimate source - the school or the PTA. AI is helping people be much more clever about the “phish”.

The key takeaway from the news story was that scammers want to force you to make a decision right away - because they know that if you give it some thought, you will realize it is probably not real.

I encourage you to set up some sort of “code” word with your immediate family and close friends that could be used to check if something really is happening. Then you could ask that question if someone calls or texts sounding very much like someone close to you. Make it a question that would not be easy to find out online.

And remember that there are no PTA emergencies! Text someone else if you get a suspicious text claiming urgency. And remember that this is why everything needs two signatures before you do anything. It slows down the process so that you can double check that it is approved.

<https://www.cbs8.com/article/news/local/back-to-school-scams-on-the-rise-in-san-diego-as-ai-makes-fraud-harder-to-detect/509-a8fec853-23f0-470f-bb85-15678003f694>

-Shawna Straw, EVP
evp@ninthdistrictpta.org



Congratulations!

The following units have been awarded the Membership Drive Grant:

Corky McMillin Elementary PTA

Foothill Oak PTA

Kimball Dual Language School PTA

Monte Vista High School PTSA

Sage Creek High School PTSA

Thank you to all who applied!

We can't wait to see your membership campaigns take place.

Leadership

What happens if we did not have an election in the spring?

Since the previous officers' terms ended on June 30th, your unit no longer has officers to run an election. A Council or District officer must be present to run your election meeting.

If you are in a Council, reach out to them to coordinate an election date.

If you are an Out of Council unit, please reach out to your Ninth District mentor if you already know that person, or to leadership@ninthdistrictpta.org.

You may not conduct any business, including dispersing funds, until you have officers.

What happens if we had our election but still have vacancies on our board?

Per the bylaws, Article V, Section 12:

“A vacancy occurring in any office shall be filled for the unexpired term by a person elected by the executive board. Election to fill a vacancy shall require a majority vote of the entire executive board, with at least ten (10) days prior notice. If notice is not given, the election to fill the vacancy shall require a two-thirds (2/3) vote. The first occupied officer position, as per the order of listing in Article V, Section 2, shall notify the executive board when a vacancy occurs in the office of president.”

-Denae Senise, Ninth District PTA, VP, Leadership Services Director
leadership@ninthdistrictpta.org

Treasurer's Corner: Starting the School Year Strong

August is here! For many of our schools, that means students are heading back to campus, while others have already been in session for several weeks. As the new PTA year gets underway, you've likely been busy updating bank account signers, preparing financial reports, and keeping everything on track.

By now, you should have either presented—or be ready to present—to your association:

- The **2026–2027 Budget**
- The **2025–2026 Annual Financial Report**
- A Treasurer's Report covering the period from the last association meeting through the end of the fiscal year
- Your **July Treasurer's Report**

That's a lot to accomplish, so take a moment to recognize all the work you've already completed!

Setting Your Secretary Up for Success

One simple way to ensure your meeting minutes accurately capture your financial report is to provide your secretary with the report before the meeting or hand them a printed copy during the meeting. This small step helps create clear, complete minutes and saves everyone time later.

Your meeting minutes should document:

- The beginning balance of each account
- Total expenses paid during the month

- The ending balance of each account
- Ratification of check numbers and electronic debits

I also like to include the month's income in my report because it provides a complete picture of the PTA's financial activity.

Remember, your Treasurer's Report reflects the PTA's financial activity—not simply what's printed on the bank statement. Your ending balance should include outstanding checks and other transactions that have been recorded but may not have cleared the bank yet.

Monthly Reconciliation: An Important Checkpoint

Each month, provide your Financial Reviewer—or another Executive Board member who is **not** an authorized signer on the account—with the reconciled bank statement.

So, what does "reconciled" mean?

It means you've compared your PTA's records with the bank statement to verify that:

- All deposits have been credited correctly.
- All cleared checks and transactions are accurate.
- Any checks that have been written but have not yet cleared the bank are identified as **outstanding checks**.

Your reconciled balance is the bank statement balance adjusted for any outstanding checks and other reconciling items, ensuring that your records and the bank's records agree.

After reviewing the reconciliation, the non-signer should sign and date both the bank statement and the reconciliation report. Their signature confirms that the Treasurer's Report accurately reflects the reconciled bank records.

This monthly verification is not only a PTA best practice—it is also an insurance requirement. Completing this review during your Executive Board meeting, when the Treasurer's Report is presented, helps ensure compliance throughout the year and makes your year-end financial review much easier.

I have linked a treasurer's [survey](#) to help 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 me at 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.

August Treasurer Huddles:

Income & Expense Procedures

August 13 @ 6:00 PM

Zoom - [Register Here](#)

Memberships - Tracking & Verifying

August 24 @ 10:00 AM

Zoom - [Register Here](#)

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



PTA Reflections Art Program 2026–2027

The PTA Reflections Art Program is back, and we're excited to kick off another year of celebrating student creativity! This year's theme is "What My Culture Means to Me", inviting students of all ages to express their unique perspectives through dance choreography, film production, literature, music composition, photography, and visual arts. Reflections is a wonderful opportunity for students to explore their creativity, share their voice, and receive recognition for their original artwork at the local, district, state, and even national levels.

If you're interested in serving as your PTA/PTSA's Reflections Chair or would simply like to receive program updates, resources, deadlines, and training information, please complete the [Google Form](#). Ninth District PTA will be scheduling a Reflections Zoom training with updated materials and program information for the 2026–2027 year soon. Also save the dates for these upcoming trainings from California State PTA :

- Jumpstart Your Reflections Program! - August 12 at 7:00 PM
- How to use the Reflections Virtual Form - August 26 at 7:00 PM
- How to Judge Reflections Entries - September 15 at 7:00 PM (NEW this year - specifically for judges)
- Prepping Reflections Entries for Judging - September 30 at 7:00 PM

We look forward to helping you bring this inspiring program to your school!

-Jemima Dutra, Ninth District PTA, Reflections Chair
reflections@ninthdistrictpta.org

Financial Safety

Email is an essential tool for PTA business, but it can also be exploited by cybercriminals to spread malware, ransomware, and phishing scams. Some of the emails we get are obvious scams, with misspellings and poor grammar, but often they can seem genuine.

Here are some tips:

- Check the Sender's email address – often you can hover over the name to verify the actual email address.
- Be careful with any links or attachments.
- Look for subtle errors — Typos, odd phrasing, or unusual formatting can be red flags.
- When in doubt, verify — Contact the sender through a known, trusted method like phone or text.
- Slow down and follow PTA protocols. Scammers are often trying to create a false emergency.

-Holly Butte, Financial Secretary
financial-secretary@ninthdistrictpta.org

Planning a Membership Raffle? Read This First!

Many PTAs love using raffles to help boost membership and they can be a fun way to build excitement! Just remember that if purchasing a PTA membership is required to enter, it is considered a raffle under California law.

PTAs conducting raffles must register with the California Attorney General's Office before holding the raffle and comply with all applicable state requirements. If you want to avoid raffle regulations, consider an opportunity drawing, which must be free to enter and cannot require a purchase or membership.

You can find registration information, requirements, and forms through this link: [California Nonprofit Raffles](#).

If you have questions about raffle rules, membership campaigns, or need help brainstorming fun ideas, we're here to help. Reach out anytime, we're excited to support your membership success!

-Jemima Dutra, Ninth District PTA, VP, Membership Director
membership@ninthdistrictpta.org

Why do we do a financial review?

A PTA financial review helps ensure that:

- PTA financial procedures are being followed.
- Income and expenses are used only for purposes approved by the association.
- Financial records are accurate and complete.

In addition, PTA insurance requires that every financial review be completed by a committee of **at least two people**. To learn more about the process, review the [California State PTA article](#) on Financial Reviews.

Where Should You Be Now?

By this point, we hope your **2025–2026 Financial Reviewer** and review committee are already working on the Year-End Financial Review. If they haven't started or you do not have a committee, your Executive Board should appoint a review committee to work with the current Financial Reviewer and complete the review. If your PTA does not have an elected Financial Reviewer, the Executive Board will need to appoint one. Before selecting committee members, be sure to review your bylaws for the eligibility requirements of a Financial Review Committee.

After the Review Is Complete

Once the financial review has been completed, the Financial Review Report should be presented to both the Executive Board and the Association.

After it has been presented:

- Upload the Financial Review Report, checklist, and any recommendations to FutureFund Connect, **or**
- Contact your council, as they can assist your unit with FutureFund Connect. (Out-of-council units contact Ninth District PTA for assistance.)

If you experience any issues uploading your report to FutureFund Connect, please contact office@ninthdistrictpta.org for assistance.

A Tip for an Easier Financial Review

During the Executive Board meeting, review the monthly bank statement and the treasurer's reconciliation. As a **non-check signer**, you will verify and sign both the bank statement and reconciliation. This is also a requirement for AIM Insurance coverage.

All About the PTA - The Parent Playbook Podcast

[Click Here to watch the podcast presented by Hula Ramos.](#)

-Hula Ramos, Escondido Council, VP, Advocacy & Community Outreach
Hula also serves on the Ninth District PTA, Communications Team.

Health

For information on the following, please click the links:

August

- [National Immunization Awareness Month \(CDC\)](#) or [National Immunization Awareness Month \(American Association of Immunologists\)](#)
- Back to School - A well-child visit is a crucial step to ensure your children are healthy and ready to learn at school. The check-ups involve a physical examination, assessment of developmental milestones, immunization review, screenings for vision, hearing, and others.

September

- [Suicide Prevention Month](#)
- [National Childhood Obesity Awareness Month](#)
- [National Sickle Cell Awareness Month](#)

October

- [Breast Cancer Awareness Month](#)
- [National Red Ribbon Week \(October 23-31, 2026\)](#)

Infectious Disease & Outbreaks

- [Cyclosporiasis](#)

- [West Nile Virus](#)

-Mary Patterson, VP, Director of Health
health@ninthdistrictpta.org



***YOUR TIME IS
WORTH IT!***

All PTAs & PTSAs:

Have someone collect volunteer hours for your board and submit them each month!

You can use these hours to show that your PTAs worth is important. The hours can be shared with your superintendents, principals, teachers, and families!

Here is my updated collector for this year. Please fill this out to report your hours. You can also use this as an example to create your own form for your units/council to fill out their hours.

<https://forms.gle/SyqMHtfUbotd6qhe9>

-Lori Fentress, Ninth District PTA, Historian
historian@ninthdistrictpta.org

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