

Ninth District PTA Leader Lab August 2026

Fall Announcements

Meeting Scripts

Required vs. Optional Software choices

Our Mission

The California State PTA's
mission is to positively
impact the lives of
children, youth and families.

Announcements

AIM Insurance Premiums- October

Unit \$345

Council \$238

Future Fund Connect- minimum of
3 officers must be listed in order to
be in Good Standing

Are you a president? Name, school
and email in the chat

What if we did not have a Spring Election?

All previous officers' terms ended on June 30th- **a Council or District officer must conduct the election portion of the association meeting**

Contact your Council or District (if OOC unit) to coordinate scheduling an election

Suggested script for a late election conducted by a Council or District officer is in the chat. Thank you Sue!

Suggested Script for the First Association meeting– Sue King

Source- Bylaws, Article VII, Section 3

The year's proposed program and budget, which includes all programs, projects, and expenditures, requires approval by the membership. The year's **proposed programs and budget** shall be presented to the association for approval at the **first association meeting of the year**.

This association shall not assume any financial obligation in any one term of office that will be carried over into the succeeding term. All approved programs, projects, and expenditures **MUST** be recorded in the association minutes, the legal record of this association. (See: **California State PTA Toolkit**)

CALL TO ORDER

“The meeting will please come to order.”

APPROVAL OF MINUTES

“The minutes of the meeting on _____ are posted/distributed. Are there any corrections?”

“The minutes are approved as presented.” OR “The minutes are approved as corrected.”

No motion needed to approve the minutes.

FINANCIAL REVIEW REPORT

“_____ will present the financial reviewer’s report.”

“You have heard the report of the financial reviewer. Any questions?”

“It has been moved and seconded that the financial review report be adopted.”

FINANCIAL REPORTS

“ _____ will present the 2025-2026 annual financial report.”

“ _____ will present the proposed budget for consideration.”

“It has been moved and seconded that the budget be adopted.”

“ _____ moves to release the funds from line items 1-50 (or budget category)

“ _____ will present the treasurer’s report.”

“You have heard the report of the treasurer. Any questions?”

“The treasurer’s report will be filed for financial review.”

PRESENTATION OF BILLS [not all PTAs present bills at the association meeting; but a list should be in the treasurer’s report]

“The treasurer will read the bills.” [presenting bills or ratifying bills that have been paid]

“It has been moved and seconded that the bills be paid.”

UNFINISHED BUSINESS

President presents items from last meeting's minutes

"The first item of unfinished business is ____."

NEW BUSINESS

Motion needed on action item before discussion and vote

"The first item of new business is ____."

"Is there a second? It has been moved and seconded that"

Motions to approve each recommendation **[this action approves all programs, projects, and fundraisers planned]** and a motion to authorize president and one other elected board members to sign contracts

PROGRAM (*Optional*)

Introduce program presenter

“ _____ will present the program.”

ANNOUNCEMENTS

Include dates for upcoming meetings and activities

“The next meeting is scheduled for _____.”

“Thank you for joining us. Please join us for refreshments.”

ADJOURNMENT

No motion needed

“The meeting is adjourned.”

Preparing for the First Association meeting

Don't forget Logistics!

How will these items be shared?

Association meeting minutes-previous spring meeting

Financial review

Annual Financial report

Treasurer's report

Programs/fundraisers/activity calendar

New Business

Budget

Programs/Activities calendar

Appointing committees

Authorization for signing contracts- President and 1 other elected officer

Required vs. Optional Software for PTAs

Required software

Future Fund Connect- you must use this program for rosters and document storage

Required vs. Optional Software for PTAs

Membership

**ANY Software/banking decisions
are Board decisions**

Totem- pays dues up channels

Future Fund- not quite set up

Membership Toolkit- unit must
pay up channels

Cheddar up- unit must pay up
channels

Cash- unit must pay up channels

Required vs. Optional Software for PTAs

Membership

Procedure to request Totem be turned off

Board/Association meeting to make that decision

Totem- download all membership data!

Email president@ninthdistrictpta.org

Request Totem be shut down

Include board/association meeting minutes with that vote and state other platform you are using

Required vs. Optional Software for PTAs

Accounting- all
have fees

myPTEZ

Quickbooks

Beekeeper by Future Fund

Important dates

Ninth District PTA District Board meeting

8/18 10AM Annex C

Treasurer Huddle

8/24 10AM

CA PTA Scholarships/Grants webinar

8/26 6PM capta.org

Treasurer Huddle 9/10 6PM

Leader Lab 9/11 10AM

CA PTA AIM Insurance Webinar

9/23 6PM capta.org

CA PTA Spotlight Awards Webinar

9/24 6PM capta.org

How to reach us:

Bylaws-

parliamentarian@ninthdistrictpta.org

Finance-

treasurer@ninthdistrictpta.org

Leadership-

leadership@ninthdistrictpta.org

Supplies/Future Fund Connect

access- office@ninthdistrictpta.org

Questions?