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Welcome

to the new term!

Please remember to
take time to enjoy the
summer with your family!

-Anne Emfinger,
Ninth District PTA, President

Quick Links:

Register for
Leader Lab

Treasurer Huddle -
July 16, 2026 @ 6:00
p.m.

Treasurer Huddle -
July 27, 2026 @
10:00 a.m.

Treasurer Huddle
Website

CAPTA Membership
Toolkit

National PTA
Membership

Quorum Questions

What is the quorum? The quorum is the number of members that must be present at meetings to conduct business. Present includes those members in the room and those members participating remotely, provided the remote members can fully participate.

Article VII, Section 1 defines association meetings as meetings of the general membership. In PTA, the association meeting quorum is based on the number of elected and appointed officers as listed in Article V, Section 2 of bylaws plus four other members. The count is the number of offices whether or not the position is filled. The minimum number of members that must be present is eleven.

The executive board is defined in Article VII, Section 1 noted here in part.

The executive board shall consist of officers of this association, the chairs of standing committees, the teacher representative, and the principal of the school.

The math to figure the quorum is the number of elected and appointed officers, the teacher representative, the principal divided by two. If there are more than nine standing committees one-half are included in the math. Standing committees are listed in the Standing Rules, number 16. The minimum number of executive board members that must be present is four.

If a quorum is not present, members can present reports and discussion can be held but no motions can be made nor can funds be spent. The myth that nothing can be done is only a myth.

--Sue King, Ninth District PTA, Parliamentarian

parliamentarian@ninthdistrictpta.org

Time to Dust Off the Bylaws!

This is a perfect time of the PTA year to make a study of the bylaws - unit or council.

Standing Rule #1 of both unit and council bylaws reads

1. Bylaws – At the beginning of the term of office, each member of the executive board shall be given a copy of these bylaws and shall be responsible for making a thorough study of them. A copy of these bylaws shall be made available to any member of this [unit] council upon request.

So, make a plan now to provide board members a copy with the direction to make a “thorough study.” Then recommendations for amendments can be considered by the bylaws committee.

Sue King

parliamentarian@ninthdistrictpta.org

Leader Lab

Please join us for our first Leader Lab on Friday, July 10th, at 11AM for a quick presentation and then a Q & A session! The topic is "How to get your PTA Board ready for Fall." This presentation is appropriate for all board members.

Here is the link to register for the Leader Lab. It will be recorded and added to the website later. [Click Here to Register.](#)

For questions, please contact Denae Senise at leadership@ninthdistrictpta.org.

Treasurers

For most units, this is the start of a new fiscal year. Hopefully, the 2025–2026 treasurer is in the process of completing the following year-end tasks:

- Annual Financial Report (Budget-to-Actual)
- IRS Form 990
- California Form 199
- RRF-1

Once completed, all of these documents should be uploaded to FutureFund Connect. Last year's financial records should then be turned over to the Financial Review Committee so they can conduct the **Financial Review – End of Year**.

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

For New 2026–2027 Unit Treasurers

If you are the newly elected treasurer, now is a good time to contact your bank and schedule an appointment to update your account signatories. You will typically need to bring:

- Election meeting minutes
- Current bylaws
- Any additional documents required by your bank

Be sure to contact the bank ahead of time and ask about their specific requirements. It can be very frustrating to arrive for your appointment only to discover that you are missing a required document.

Planning Ahead

July is usually a slower month for PTAs, making it the perfect time to establish systems that will help you stay organized throughout the year.

Consider the following questions:

- When will executive board meetings be held?
- What deadline will you set for submitting Payment Authorization/Reimbursement Forms?
 - One week before the meeting?
 - Three days before the meeting?
- Will your treasurer reports cover the 1st through the end of each month, or will they run from meeting to meeting?
- Do you have a treasurer report template ready to use?
- Do you understand the format of the report so that it remains consistent from meeting to meeting?
- Who will verify the monthly bank statement?
 - This person must be someone who is **not** an authorized check signer.
- When will the verifier review:
 - The bank statement
 - The bank reconciliation
 - The treasurer report

Remember, the bank statement and bank reconciliation must be reviewed, signed, and dated each month. Establish a process now to ensure this requirement is consistently met.

A Few Helpful Tips

One practice I have found helpful is to write any motions I need to make directly on my treasurer report. This helps ensure I don't forget important actions during the meeting.

I also send my treasurer report electronically to the secretary before the meeting. This allows the beginning and ending balances, expenditures, receipts, and motions to be copied directly into the meeting minutes, saving time and improving accuracy.

A little planning now can make your year as treasurer much smoother and less stressful.

Treasurer Huddles

Treasurer Huddles are held twice a month via Zoom. During these 20- to 30-minute sessions, we review common treasurer procedures, routines, and best practices. We also reserve time at the end of each session to answer questions and discuss any challenges you may be facing. You can register for each Huddle on our [calendar](#).

July Treasurer Huddles

- **Treasurer Huddle -**
Organizing Budget Categories, Membership Dues plus Q & A - July 16, 2026 at 6:00 PM
[Register here.](#)
- **Treasurer Huddle -**
Prepare for the First Association Meeting, Totem plus Q & A - July 27, 2026 at 10:00 AM
- [Register here.](#)

If you're unable to attend, don't worry—all [Treasurer Huddle](#) slides and recordings are posted on our website for you to access at your convenience.

Don't Hesitate to Ask for Help

Most importantly, ask for help when you need it! If you run into a problem or have a question, please feel free to contact me, Deborah Childers, treasurer@ninthdistrictpta.org. Addressing issues early is almost always easier than trying to fix them later. Don't let a small problem grow into a bigger one—we're here to support you.

**Membership Resources to Help Your PTA
Grow!**

Time to kickstart your Membership Drive for the 2026-27 school year! Ready to take your membership campaign to the next level? Here are some tools and resources designed to help recruit members, build engagement, and achieve their goals!

- **California State PTA Membership Toolkit**

The California State PTA Membership chapter has guidance, best practices, goal-setting strategies, promotional ideas, and resources to support a successful membership campaign. Download it here: [California State PTA Membership Toolkit](#)

- **National PTA Membership Resources**

Looking for fresh ideas and ready-to-use marketing materials? Explore the National PTA Membership Resource Center for customizable promotional tools, campaign inspiration, membership recruitment tips, and more: [National PTA Membership Resources](#).

Whether you're planting the seeds of a new membership drive or growing an already thriving PTA, these resources can help you build stronger connections and welcome more families into your PTA community!

For additional support or questions, contact Jemima Dutra at membership@ninthdistrictpta.org.

Health

JULY:

Major Holidays:

- Independence Day: The United States celebrates the 4th of July with fireworks, parades, and cookouts.

Other July Observances:

- [Juvenile Arthritis](#) Awareness Month
- International Group B Strep Throat Awareness Month
- Eye Injury Prevention Month
- [World Watercolor Month](#)
- [National Anti-Boredom Month](#)

DON'T FORGET YOUR SUNSCREEN!

STAY HYDRATED, DRINK WATER!

--Mary Patterson, Ninth District PTA, Vice President, Director of Health

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