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Happy September!

It is hard to believe we are already two months into the term. I hope everything is going well and everyone is settling into their routines and PTA roles. As you move along into your year, don't forget that plans change and that's OK. Don't be afraid to scrap Plan A and find a Plan B if something isn't going to work out. Just because it's "always been done that way" doesn't mean it has to continue that way. Change is OK! It helps us grow as an organization and as leaders.

Membership drives should be in full swing. Please remember to remit all manual memberships up through channels. Manual memberships are any memberships not received via Totem or FutureFund. The dues portion not belonging to the unit (per capita) must be forwarded through channels at least monthly.

If you need ideas for your membership campaign, visit the National PTA website and find MANY ideas to help grow your membership. <https://www.pta.org/home/run-your-pta/membership-resources>. CA State PTA has a list of Membership Challenges and Incentives throughout the 2026-2027 year. You can find more information here: <https://capta.org/membership/membership-challenges/>. If you have not joined a PTA yet, please do! We can help you find a local unit to be a part of. The more members we have the more powerful our voice locally, regionally, throughout California and nationally!

On that note, CA State PTA is asking us all to put our voices to use. California State PTA believes that all California students need a comprehensive, interdisciplinary climate education that will help prepare them for the future they face. That's why California State PTA is co-sponsoring California's Senate Bill 1048 (Becker) – The California Seal of Climate Literacy Act. The bill creates a voluntary diploma endorsement program for California high school students. Students who graduate with a Seal of Climate Literacy on their diplomas will be recognized for completion of relevant science and climate literacy coursework and hands-on learning projects

in their communities. SB 1048 has passed through the required committees in both the State Assembly and Senate and received strong bipartisan support. Floor votes in both houses have taken place and the bill is going to the governor for his signature. Our voices can help assure that the Seal of Climate Literacy becomes a reality, providing a framework for increasing access to climate learning across California. It's on the Governor's desk right now - and the clock is ticking for him to sign or veto the bill. Your help is greatly appreciated!

TAKE ACTION: californiapta.quorum.us/campaign/168703

The enthusiasm, drive and passion my fellow PTA volunteers across Ninth District PTA have is inspiring. You're all amazing! Please know Ninth District PTA is here to support you as leaders, units/councils, and members. There are many resources available to you. We are setting up training opportunities so be on the lookout for information on those. If there is something you need, please let us know. I look forward to seeing the great things our PTAs are doing around Ninth District and would love an invitation to visit your events.

-Anne Emfinger, President
president@ninthdistrictpta.org

Quick Links:

**Register for Leader
Lab**

**Treasurer Huddle -
September 10, 2026 at
6:00 p.m.**

**Treasurer Huddle -
September 21, 2026 at
10:00 a.m.**

**Treasurer Huddle
Website**

Budgeting Guidelines

**5-Minute Financial
Review**

Are You Ready For the Dreaded "T" word?

Don't worry—tax filings don't have to be overwhelming! Tax filings and RRF-1 forms are due 4½ months after the fiscal year ends (usually November 15th, though you'll want to double-check your unit's bylaws to confirm your specific date). You don't need to wait until the deadline to get this checked off your list.

Here is a quick overview based on your unit's gross income:

- **Gross Income Under \$50,000:** You can easily complete this yourself online in about 45 minutes! You'll need your 2025–2026 Annual Financial Report and your Bylaws to file forms 990-N, 199-N, and RRF-1 (with CT-TR-1). Need a guide? Check out this helpful [walkthrough video](#), and keep an eye out for an upcoming workshop!
- **Gross Income Over \$50,000:** We recommend hiring an experienced non-profit tax professional to complete forms 990-EZ/990 and state form 199. The preparer usually prepare the RRF-1 but doesn't submit the form; make sure to file it yourself along with the 990 and required fee.
- **Important Note on Deadlines:** Please be sure to file your RRF-1 form on time! The Registry of Charitable Trusts (part of the Attorney General's office) charges late penalties, and state rules strictly prohibit using PTA funds to pay late fees or penalties.

-Deborah Childers, Treasurer

treasurer@ninthdistrictpta.org

Education, Family & Community Engagement

The Ninth District PTA Vice President of Education, Kiki Bispo, is seeking input from our PTA community! Please take a few minutes to let us know what topics, tips, and research you'd like to see regarding education, family, and community engagement. We highly encourage you to fill out this quick survey: [Click Here to Fill Out the Google Form](#).

-Kiki Bispo, Vice President, Education Director

education@ninthdistrictpta.org

Kempton Street Literacy Academy PTA

Our very own Kempton Street Literacy Academy PTA was highlighted in a recent article on the National PTA newsletter. The article is called, "How We PTA - Kempton Street Literacy Academy PTA". To read more about what this PTA is doing at their school and for their community please click here: [Scroll down to "PTA Connected" and click it to read the article](#).

BE ON THE LOOKOUT!

URGENT PTA / PTSA DOJ REGISTRATION NOTICE

- **1. CHECK YOUR MAILBOX:** Look for an official letter from Attorney General Rob Bonta / CA Dept. of Justice.
- **2. KEY INFORMATION INSIDE:** The letter contains your unique **ONLINE FILING REGISTRATION CODE**.
- **3. MANDATORY ANNUAL FILING:** This code is required to file forms RRF-1 and CT-TR-1 or 990 online.
- **4. PTA COMPLIANCE:** Essential yearly registration to accept donations & raise charitable funds in California.
- **5. SAVE THIS LETTER:** Keep it in a safe place. Plan to upload to FutureFund Connect for permanent storage.

DO NOT DELAY – Letter expected soon!

* This notice applies to all California PTA and PTSA units.

Treasurer Resources & Friendly Reminders

- **Gross Income Bookkeeping:** PTAs run on a gross income and gross expense bookkeeping system. Make sure each income category (e.g., fundraisers or programs) has a matching expense category for proper tax reporting. Take a look at these [Budgeting guidelines](#) for assistance. Remember, if you amend your budget, it must be approved first by your executive board and then by a two-thirds vote at your next association meeting.
- **Authorizing Expenditures:** Even after your budget is adopted, individual expenses still require board approval before spending! Planned expenditures must be presented at an executive board meeting with a quorum present, documented in the meeting minutes, and accompanied by a Payment Authorization form with backup documentation. To help keep your unit on track, refer to the [Finance Toolkit](#).

September Treasurer Huddles

- **September 10th at 6:00 PM**
 - **Government Filings**
 - [Register Here](#)
- **September 21th at 10:00 AM**
 - **Vendors - What forms are needed & What do I need to track?**
 - [Register Here](#)

If you run into any questions or need a hand, please reach out to your council treasurer or contact me directly at Treasurer@ninthdistrictpta.org. You never have to wait for a formal training session to get the help you need!

Ensuring Fiscal Transparency: A Quick Guide for Financial Reviewers

At every monthly executive board meeting, our treasurer presents the treasurer's report. To maintain strong fiscal transparency, a board member who is **not** a bank signatory should review the corresponding bank statement.

What to Look For

When reviewing, simply compare the bank statement against the treasurer's report to double-check that:

- **Deposits & Checks:** All deposit amounts and check numbers align.
- **Debits & Withdrawals:** ACH/debit transactions are recorded and there are **no cash withdrawals**.
- **Balances & Uncleared Checks:** Beginning/ending balances match up and any uncleared checks are fully accounted for.
- **Proper Format:** The treasurer's report should reflect transactions in date order with consecutive checks (rather than just copying the bank statement).

Handling Discrepancies

If you spot an error or missing detail, let the treasurer and president know right away. The discrepancy will be resolved, and an updated report will be presented at the next board meeting.

Once everything checks out, the non-signatory reviewer simply signs and dates the bank statement and bank reconciliation for that month! Here is a document you may use to help you with a [5-Minute Financial Review](#) each month.

Why this matters: If a claim for fraud or theft ever arises, our liability insurance will request bank statements, evidence of bank account reconciliations, and treasurer reports. Taking these monthly steps protects your unit!

-Deborah Childers, Treasurer
treasurer@ninthdistrictpta.org

Financial Reviewers

Financial Reviewers are unique in that our job is not finished on June 30th like other officers. We still need to finish that Year-End Financial Review, and of course it cannot be completed until the 2025-2026 financial books are closed on June 30th. Hopefully, your financial review committee was appointed earlier in the year and you have scheduled a day and time to review the books. If you completed a Mid-Year Financial Review you will be checking the financial documents usually from January 1 to June 30th. If you did not complete a mid-year review, you will need to review from July 1 to June 30th.

But what happens if your 2025-2026 Financial Reviewer is unable to complete the Year-End Review? Your new financial reviewer can complete the review as long as the committee has a majority of members who were not signers on the account.

If you do not have a financial review committee, don't despair! Contact your council (or if you are out-of-council you can contact Ninth District PTA) for assistance. There are resources on the Ninth District PTA [website](#), and even a [video](#) that will help you through the financial review process as well.

Remember, your Year-End Financial Review should be presented first to your Executive Board, with a motion to accept the Financial Review and move it to the Association for approval. It is best to aim to have your 2025-2026 Year-End Financial Review approved by the Association at your first (or at least second) Association meeting of 2026-2027.

If you have any questions, please contact David Rogers at financialreviewer@ninthdistrictpta.org

Association vs Executive Board Meetings

Association Meetings

PTA members are the "association" for a unit and play an important part in conducting the business of a PTA.

By participating in association meetings, members have the opportunity to make motions, provide input on agenda items and make collective decisions by voting on actions for a PTA.

They also vote to approve programs and activities recommended by the executive board. They are responsible for adopting budgets and financial reviews as well as approving the expenditures of a PTA.

In addition, the PTA membership is the only group for a unit with authority to:

- Elect the nominating committee, officers and PTA convention delegates
- Adopt bylaws and standing rules
- Approve contracts for PTA programs and events

- Authorize an individual to represent the PTA
- Authorize a unit's position on an issue after a study

As outlined in bylaws, association meetings and the agenda must be publicized at least ten (10) days in advance. Written notice of the meeting, sent to all members, includes the date, time, location and proposed business of the meeting.

For proposed bylaw amendments and the annual election meeting as defined in the bylaws, written notice must be given at least thirty (30) days in advance.

All members are encouraged to attend association meetings. It is recommended that a program be presented as an addition to the meeting to better engage members and strengthen family-school partnerships.

Executive Board Meetings

PTA executive board meetings are held each month during the school year. They provide an opportunity for officers and chairs to share ideas, provide updates and oversee the management of a PTA.

The meetings are also a unique forum for board members to carry out their collective responsibility to:

- Monitor financial and membership reports
- Authorize the payment of bills within the limits of the unit's budget
- Approve minutes from the previous meeting
- Create committees as needed
- Fill vacancies on the board during the term
- Ensure that adopted budgets and required reports are uploaded to the document retention system
- Ensure that tax and government filings are submitted each year by the due dates

Developing goals and plans for PTA programs and events that meet the interests and needs of a school community are some additional activities that take place at board meetings.

-Sue King, Parliamentarian

parliamentarian@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 :

- 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



For information on the following, please click the links:

September

- [Suicide Prevention Month](#)
- [Childhood Cancer Awareness Month](#)
- [National Childhood Obesity Awareness Month](#)
- [National Sickle Cell Awareness Month](#)
- [National Hispanic Heritage Month](#) - Observed from September 15th to October 15th.

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

Ninth District
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