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Happy October!

Given that we are entering election season, I want to take a moment to remind everyone that PTA is the largest and oldest volunteer advocacy organization dedicated to the welfare of children. With all the excitement of the start of the term, book fairs, fall fests and other programs, I think that fact tends to be overlooked or forgotten.

One of the most important things PTAs can do is to encourage people to vote. PTA can hold voter registration drives to encourage parents, students and members to register to vote. Did you know students can pre-register to vote as early as age 16? This is also a great opportunity for our High School PTSAs.

While we do not support candidates, as PTA, we can take a position on ballot measures. California State PTA has taken positions on a number of propositions in the November ballot. You can find that information here: <https://capta.org/advocacy/state-ballot-measures/>

California State PTA also has a whole list of resources to help PTAs with Civic Engagement: <https://capta.org/learn/use-your-voice/civic-engagement/>

On that note, I would like to share a couple of events coming up later in the year that you should consider attending. The first is the CAPTA Legislation Conference, February 1-2, 2027 in Sacramento, CA. This is a great opportunity to learn about and see PTA's advocacy work in action. Registration opens this month! <https://capta.org/programs/legislation-conference/>

The second event is the CAPTA Convention, April 30 - May 2, 2027 in Ontario, CA. This 3-day convention is an amazing opportunity for training, networking with other PTA leaders from across the state, and includes the annual meeting of the association. More information will be

coming out soon. Both of these events are allowable expenses in your PTA budget, and we strongly encourage your units/councils to participate.

-Anne Emfinger, President
president@ninthdistrictpta.org

Quick Links:

Register for Leader Lab

Register: Treasurer
Huddle - October 8, 2026
at 6:00 p.m.

Register: Treasurer
Huddle - October 26,
2026 at 10:00 a.m.

Treasurer Huddle
Website

Apply Now! Ninth
District PTA Program
Grants 2026-2027

Financial Review
Checklist

Ninth District PTA Program Grants 2026-2027

The Ninth District PTA is offering Program Grants to unit and council PTAs/PTSAs to implement programs or events that support the PTA's mission statement and goals. **Please apply - it's easier than you think!** The Ninth District PTA Program Grant is partially funded with the \$1 per member dues forwarded through channels. Grants are available for programs in the following areas at the unit and council levels: **Advocacy, Health and Welfare, Parent/Student Education, and Parent/Student Involvement.**

Ninth District PTA grants are a *one-time funding source* and individual awards will not exceed \$750. If you are thinking "if we just had an extra \$750 we could try this new program," now is the time to act! Funds must be used or returned by May 31, 2027. All requested paperwork must be completed and included for an application to be considered. The PTA applying for the grant must have association approval for the program. Examples of recent programs that have been funded: Art night for students and families, furnishings for a mental health "chill space" open to all students, supply closet for toiletries and clothing open to all students, 8-week program on World Music, school garden or orchard, and student lunch clubs.

The **deadline** for grant applications is **noon on Friday, October 23, 2026**. Please submit the application to the Ninth District PTA via email to

communityconcerns@ninthdistrictpta.org OR online via Google Forms by going to this link: [Click Here to Apply for the Ninth District PTA Program Grants 2026-2027](#). You may also print and mail your application and supporting documents to the Ninth District office at [6401 Linda Vista Rd](#), Annex A, San Diego CA 92111 to be received by **October 23, 2026**. Ninth District PTA *will not consider* applications received *after the deadline*. You may print the application that follows to send by mail.

Grant recipients must:

- **Submit a report detailing the project's initial goals, outcomes, expense report, photos (and video if possible,) AND any remaining funds no later than May 31, 2027.**

The Ninth District PTA Grant Committee will select grant recipients and the decision of the committee is final. Ninth District PTA will notify each grant award recipient by October 30, 2026. Grant recipient names will be included in the Ninth District PTA Annual Meeting/Founders' Day program.

Criteria

- Your PTA/PTSA must be in Good Standing; i.e., required officers, minimum number of membership dues paid and insurance paid. *The due date for insurance falls after the grant application deadline this year. We recommend that you pay your insurance as soon as the insurance payment portal opens and via ACH for immediate credit. If the insurance is not paid by the due date, the Ninth District PTA will request the PTA to return the grant funds.*
- The PTA applying for the grant must sponsor the program or event.
- Only one completed application will be accepted from each unit or council.
- No payment of salaries or purchase of equipment will be considered.
- No grants will be awarded for Grad Night or Disaster Preparedness materials.
- Honoraria for program speakers may be listed as grant expenses.
- New programs/events, high percentage of students or community served, and financial need to be given strong consideration by the committee.

If you have any questions, please contact Betsy Mueller at communityconcerns@ninthdistrictpta.org or [619-838-1500](tel:619-838-1500).

You can also [click here](#) to find the printable application to mail in.

Important Upcoming Dates:

October 2026

- AIM Insurance Premium Payment Window Begins
- October 20, 2026 - District Board Meeting (Council Presidents & Out-of-Council Presidents ONLY)

November 2026

- November 11, 2026 - Veteran's Day (Office Closed)
- November 15, 2026 - Membership Required (Minimum membership - 15)
- November 15, 2026 - Government Tax Filings Due (for July 1-June 30 Fiscal Year)
- November 26-27th - Thanksgiving Break (Office Closed)

Halfway to Mid-Year Financial Review!

Treasurers, we're officially halfway to our mid-year financial review! To keep things running smoothly and avoid a last-minute scramble in December, check in with the [Financial Review Checklist](#) today to make sure your PTA financial procedures are on track.

Three Key Reminders:

1. **Bank Reconciliations:** Reconcile your bank statements monthly.
2. **Signatures:** A non-signer must review and sign off on each bank statement and reconciliation.

Payment Authorization Requirements: Make sure all payment authorizations include:

- Signatures from both the **president** and the **secretary**.
- The **date the expenditure was approved** in the meeting minutes.

Cash Verification Forms: Make sure all cash verification forms include:

- Two signatures, at least one is an executive board member.
- The date of the event, the budget category, and whether any of the funds are membership.
- Each person counting money should keep a copy of the cash verification form.
- Deposits should be made the day of the event, or stored securely for a next-day deposit.
- The treasurer does not have to make the deposit, but it should be an executive board member. The person should sign the cash verification form with the amount they received for deposit.

-Deborah Childers, Treasurer

treasurer@ninthdistrictpta.org

Why Your PTA/PTSA Should Still Do a Mid-Year Financial Review!

Even though California PTA no longer requires two financial reviews per year, completing a mid-year review is still one of the best steps your unit or council can take! Beyond ensuring strong financial practices, reviewing six months of records is far simpler and faster than tackling a full 12-month review at the end of the year.

Setting Up Your Review Committee: The Financial Reviewer should collaborate with the President and Executive Board to assemble the committee. Keep these key guidelines in mind:

- **Committee Size:** The committee must have at least **two members**—however, AIM required a **3-person committee** for insurance purposes during their September webinar, so aim for three!
- **Independence:** The majority of members **cannot** be account signers, live in the same household, or be related by blood or marriage.
- **Resources:** Check your bylaws and the Finance Toolkit for complete setup details.

Plan ahead and get your mid-year financial review committee appointed today! If you have any questions or need support, reach out to your Council Financial Reviewer or contact **David Rogers** at financialreviewer@ninthdistrictpta.org.

Time to Update

Unsure if it is time to update your association bylaws? The date to check is the date of the state parliamentarian's signature.

If the signature is 2021 or older – now is the time to update the bylaws to remain in good standing. Using the new FutureFund Connect platform to update is easy and fast.

If you need help, contact your council officers, if in council. If your association is out of council, contact your district mentor or me, district parliamentarian.

-Sue King, Parliamentarian
parliamentarian@ninthdistrictpta.org

Recruiting Student Members

Students are the reason we PTA! How can you recruit more student members?

- Have a small “join now” incentive just for students at the membership table during registration days. Find out what the “it” thing is for students this year and buy 20 of them. One year it was inexpensive ear buds, the next year it was a particular brand of socks! Advertise that the first 20 students who join on the spot can take that gift home.
- Point out the programs and events sponsored by PTA that directly impact students. Or survey students to find out what they would like to see from PTA.
- Co-create a student engagement plan. How many students know that PTA provides the vehicle to advocate at the local, state and national level for the things that are important to kids? Find some relevant examples, then ask some students to help you advertise on the platforms that students engage with.

- Ask a student to report on PTA activities affecting kids at the PTA meetings. Two students would be even better! Most kids will welcome the opportunity to speak on their programs and then advocate for more.
- Make sure that students are welcomed at PTA meetings, know how they can participate and are not left alone. Invite students to attend a designated association meeting where they can be heard.

-Denae Senise, Vice President Leadership Service Director

leadership@ninthdistrictpta.org

Pro-Tip: Recording Online Donations

When receiving donations through platforms like Totem, Square, or PayPal, remember to record the **full donation amount as income** and the **associated transaction fees as expenses**.

- **Example:** If you receive a \$30.00 donation through Totem, Totem keeps \$1.50 (5%) as a processing fee and sends \$28.50 to your PTA.
- **Your books should show:**
 - **\$30.00** Income (Donations)
 - **\$1.50** Expense (Bank/Processing Fees)

*Note: This rule applies to all donation platforms, including PayPal. However, you do **not** need to record the \$1.00 Totem membership fee, as members pay that directly.*

-Deborah Childers, Treasurer

treasurer@ninthdistrictpta.org

Document Upload Check-In

September 30th was the deadline to upload the following key documents to **FutureFund Connect**:

- 2025–2026 Annual Financial Report / Budget-to-Actual Report
- 2025–2026 Year-End Financial Review Report / Checklist and Recommendations
- 2026–2027 Budget

Don't forget prior-year filings! Please verify that last year's tax and registration reports were uploaded as well:

- **Attorney General:** RRF-1 (along with CT-TR-1 if gross revenue was under \$50,000)
- **IRS:** 990N, 990EZ, or 990
- **Franchise Tax Board:** 199N or 199

If any of these reports are missing, reach out to your previous board for quick assistance in locating the files.

Staying on top of these small details keeps our PTAs strong and ready for success!

Can you do a separate post for the Tax Filing Assistance?

Let's tackle tax season together! If your unit's average revenue over the past three years was \$50,000 or less, sign up using the attached form to file your IRS 990N, Franchise Tax Board 199N, and AG RRF-1/CT-TR-1 forms. In about an hour, you'll be all set and good to go!

[Tax Filing Sign-up Form](#)

-Deborah Childers, Treasurer

treasurer@ninthdistrictpta.org

Health



[Breast Cancer Awareness Month](#)



[Red Ribbon Week](#)



[ADHD Awareness Month](#)



[World Mental Health Day - October 10, 2026](#)



[Student-Athlete Mental Health Week - October 3-10, 2026](#)



[Halloween Safety](#)

-Mary Patterson, Vice President Director of Health

health@ninthdistrictpta.org

Save The
Date

Ninth District
PTA[®]
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130 Years
of **PTA**

NINTH DISTRICT PTA

**ANNUAL MEETING &
FOUNDERS' DAY**

Celebrating the past,
Inspiring the future

WEDNESDAY, FEBRUARY 17, 2027



**SHARP PREBYS INNOVATION AND
EDUCATION CENTER**



**8695 SPECTRUM CENTER BLVD,
SAN DIEGO, CA 92123**

California State (CAPTA) & National PTA Grants

CAPTA Grant Application Deadline is October 15, 2026 at 11:59 p.m.:

- Program Grants - [Click Here to Apply](#)
- Continuing Education Scholarships - [Click Here to Apply](#)
- Henderson/Jaffe DEI Grant - [Click Here to Apply](#)

If you would like more information on the California State PTA Scholarships and Grants please [click here](#).

National PTA Grants Deadline is October 13, 2026 at 11:59 p.m. (PT)

- Language Access Grant - [Click Here to Apply](#)
- Vape-Free Futures Challenge Grant - [Click Here to Apply](#)
- High School PTA/PTSA Youth Engagement Capacity Building Grant - [Click Here to Apply](#)
- Center for Family Engagement PTA Connected Fellowship - [Click Here to Apply](#)
- National PTA Program Grants - [Click Here to Apply](#)
- Coming Soon: Youth-Led Service Grant - [Register for Info](#)

If you would like more information on the National PTA Grants please [click here](#).

Ninth District
PTA[®]
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Ninth District PTA
[6401 Linda Vista Rd.](#), Annex A
San Diego, CA 92111
(858.268.8077)

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