



## Information Meeting / Reunión informativa

**Sonia Sotomayor Elementary**  
**July 12, 2024**

**PTA de la Escuela Sonia Sotomayor**  
**12 de julio de 2024**

“In every day, there are 1,440 minutes. That means we have 1,440 daily opportunities to make a positive impact.” ~ Les Brown

Good afternoon, welcome to the PTA information meeting for Sonia Sotomayor School

I call this meeting to order at 5:00 p.m.

I am Anne Emfinger, Vice President Leadership Services Director for Ninth District PTA. My responsibilities include the organization of all new PTAs in San Diego and Imperial counties. This PTA information meeting is the second step to the organization of a PTA at your school

. Thank you to your principal for agreeing to host a PTA on your campus, our first step in the process to becoming a PTA.

Thank you all for joining us. I see we have the required attendance today so we may proceed.

Your  
School  
Needs A  
PTA

Su  
Escuela  
Necesita  
un PTA

Presenter/Presentador

Anne Emfinger, Vice President Leadership Services Director

Anne Emfinger, Vicepresidenta Directora de Servicios de Liderazgo

Today we're here to discuss PTA, how the PTA organization process works and answer any questions you may have.

## Ground Rules

## Reglas básicas

- |   |   |
|---|---|
| • Raise your hand to speak, or if you have a question   | • Levante la mano para hablar o si tiene alguna pregunta. |
| • Wait for the chair to acknowledge you before speaking | • Espere a que el presidente le reconozca antes de hablar |
| • One speaker at a time                                 | • Un orador cada vez                                      |
| • One subject at a time                                 | • Un tema cada vez  |
| • Courtesy for all                                      | • Cortesía para todos                                     |

Before we get started here are some ground rules, I'd like all of us to follow please:

- Raise your hand to speak, or if you have a question
- Wait for the chair to acknowledge you before speaking
- We will take one speaker at a time
- With one subject at a time
- This allows courtesy for all

Can we all agree to these ground rules?

PTA is about...

La PTA se  
trata de...



Kids!

¡Chicos!

PTA is about kids...PTA works for all children - everywhere!

So how do you get to be a PTA school?

There are of course of rules, as we are a nonprofit organization, we'll get to those later as we go along, know that Ninth District PTA is here to support you so you can do good things for kids

## PTA...

PTA is the largest and oldest volunteer organization whose mission is focused on the well-being of children and families.

PTA es la organización de voluntarios más grande y antigua con una misión enfocada al bienestar de los niños y las familias.

**PTA is the oldest all volunteer organization in the United States –**

**For more than 125 years, PTA has promoted the education, health, and safety of children, youth, and families. Putting children first.**

## California State PTA

- The mission of California State PTA is to positively impact the lives of all children and families.

## PTA del Estado de California

- La misión de la PTA del Estado de California es tener un impacto positivo en la vida de todos los niños y familias.

**The mission of California State PTA is to positively impact the lives of ALL children and families.**

## 5 different levels

- Unit PTA
- Council PTA
- District PTA
- State PTA
- National PTA

## 5 niveles diferentes

- PTA de unidad
- PTA del Consejo
- PTA de distrito
- PTA estatal
- PTA nacional

PTA operates at 5 different levels, starting with the school.

The Unit PTA is at the school level.

The Council PTA is a group of units in a particular area or school district. The council PTA oversees and helps the units in their area. Since Sonia Sotomayor Elementary is in Chula Vista, Chula Vista Council PTA would be your direct oversight.

The District PTA is made up of councils and out of council PTAs. The district PTA oversees and helps all council and unit PTAs in their area. In Ninth District PTA there are 15 council PTAs and 39 out of council PTA units not attached to



a council. We oversee more than 300 units in San Diego and Imperial counties.

The California State PTA is made up of all districts, councils, and unit PTAs in California. All units, councils and district PTAs are constituent organizations of California State PTA.

National PTA is made up of all State PTAs and their constituent organizations.

When you are a member of PTA you belong to all levels of PTA. Together, we have a powerful voice for children.

The Legal  
Side of PTA

El lado legal de  
la PTA



PTA is a private, non-profit membership organization whose focus includes the health, education, and safety of students.

We operate in public schools with school administration approval. PTA is a guest on campus and must have permission to conduct all activities and events while on the school campus.

Because PTAs are nonprofit organizations, there are government rules to ensure PTAs keep their nonprofit status. There are 4 major government agencies that oversee all nonprofits, not just PTAs.

The 4 main governing agencies are:

- 1) The Federal Internal Revenue Service. To

be tax-exempt under section 501(c)(3) of the Internal Revenue Code, an organization must be organized and operated exclusively for exempt purposes set forth in section 501(c)(3), and none of its earnings may inure to any private shareholder or individual.

2) The California State Franchise Tax Board. All nonprofits in the State of California must report yearly to the FTB

3) The California Attorney General's Office of Charitable Trusts. The Attorney General regulates charities and the professional fundraisers who solicit on their behalf. The purpose of this oversight is to protect charitable assets for their intended use and ensure that the charitable donations contributed by Californians are not misapplied and squandered through fraud or other means. The Attorney General regulates charities and the professional fundraisers who solicit on their behalf.

And

4) The California Secretary of State. This department oversees California Corporations Code. California Corporations Code contains the full text of the California Corporations Code, as well as regulations governing capital access companies, nonprofit corporations, nonprofit mutual benefit corporations, and professional corporations.

All PTAs are noncommercial, nonsectarian, and nonpartisan organizations. These basic policies are part of every PTA's bylaws and govern the activities of all PTAs. They ensure a unity of purpose through the members' commitment to the Purposes of the PTA and help protect the association and its members from exploitation.

**You may read PTA policies on the California State PTA website:**

**<https://capta.org/about/our-mission/policies/>**

When a PTA is organized an independent 501(c)(3) is created by applying to the IRS for nonprofit status. As a 501(c)(3) the PTA is allowed to accept donations that are tax deductible.

- All PTAs in California are constituent organizations of California State PTA . As such, California State PTA and National PTA maintain strict adherence to all requirements in order to retain that exemption and enjoy nonprofit tax-free status. Our tax exemption is all tied together. Where goes one, goes all.

There is an application process to gain 501(c)(3) non-profit status.

The application to the IRS is streamlined because PTAs are organized under California State PTA as constituent organizations under

their General Exemption.

Once the PTA is accepted by the IRS as a nonprofit organization, the California Franchise Tax Board will also approve the unit as a constituent organization of California State PTA.

In order to raise money in the State of California, each PTA must also register with the California Attorney General's office of Charitable Trusts and provide a report to the AG every year.

- ✓ This registration and yearly reporting, permits nonprofits to fundraise in California. There is a \$50.00 fee to register with the Attorney General's Office.

Ninth District PTA pays that initial fee and files all start up paperwork to expedite the acceptance of the new PTA.

Once registered, yearly reporting by the PTA is required to fundraise in California. Failure to file will result in suspension, fines payable by officers, and all fundraising must cease until the PTA is current with the Attorney General's office..

Once organized, your PTA becomes a small company with responsibilities.

All PTAs must:

Comply with the Internal Revenue Service

(IRS), Franchise Tax Board (FTB) and the California Attorney General's office (AG) These reports are mandatory.

Have a minimum of 15 members

Elect officers yearly before the fiscal year end: A minimum of a president, secretary, and treasurer;

Remit membership per capita dues and pay insurance premiums by the California State PTA due dates; The membership amount of \$5.25 sent forward to each level of PTA is outlined in the unit bylaws. National PTA receives \$2.25, California State PTA \$2.00, and Ninth District PTA \$1.00.

These funds are per member and allow PTA to function and provide services to each level, respectively.

Yearly file all required state (199/199N) and federal (990N/990EZ/990) tax returns, and reports are due to the Attorney General's Registry of Charitable Trusts (RRF-1) and (CT-TR-1) annually by the due dates.

Have Bylaws reviewed yearly and approved every five years according to the procedures of California State PTA.

Perform reviews of financial records,

File any other required government forms,

Meet other criteria as may be prescribed by the California State PTA.

PTA is a membership organization, so all

decisions are confirmed by the members.

- PTA boards plan and recommend activities, but the membership votes, yes or no, to support the programs, fundraisers, and other PTA activities. The power of PTA is its membership.

That all sounds complicated, but PTA provides the structure and assistance you need to manage those responsibilities, and the district PTA handles all the legal paperwork required to become a PTA. The signatures of the principal and 2 PTA officers, (the president and secretary) are needed on some of the legal documents.

The (council and district PTAs) as well as State and National PTA provide training, ideas and information to PTA leaders and members.

What you get from PTA depends on how much you:

Read and use PTA materials

Take advantage of Training / through PTA conventions and workshops

Learn about what is available from local/state/ and National PTAs

and encourage your PTA to conduct programs helpful to you and your children

Bottom line:

If PTA officers agree to abide by the legal requirements and file the necessary reports,

stay in compliance, and follow the rules, the PTA will remain in business.

If you do not abide by the legal requirements, Ninth District PTA and or California State PTA will be forced to close the PTA business.

Besides rules, what are the benefits of PTA?



## Why People Join PTA?

- Benefits to your child.
- Become connected.
- Help your child succeed.
- Benefits your school.

## ¿Porque unirse a PTA?

- Beneficia a sus hijos.
- Participar y estar conectado.
- Ayudar a su hijo a ser exitoso.
- Beneficia a la escuela.

Your involvement in PTA shows your child, education and school are important. Studies show that when parents and families are involved, students perform better in school. Involved parents understand the challenges schools face and become part of the solution – part of the change.

Parenting is not easy – it helps to share ideas, concerns and experiences with other parents and educators in the community. PTA functions are opportunities to meet other parents and teachers, building rapport and discussing issues that are on your mind.

Connecting the school and families develops a positive reputation in the community leading to more community support, and Family engagement leads to:

- ✓ Better grades
- ✓ Increased graduation rates
- ✓ Improved test scores
- ✓ And More college- and career-ready students

Local PTAs build a broad base of parent and community involvement. Parents and community members partner to improve schools: providing building improvements, curriculum-based programs, social events, all of which are vital to a school's success.

Who can join PTA? Everyone who pays the unit membership dues may be a member of PTA, even your children!

***PTA works for all children - everywhere!***  
***Together... everychild.onevoice.***

## PTA provides opportunity for...

- Change
- Helping all children!
- Involvement
- School site  
Information

## La PTA ofrece la oportunidad de...

- Cambiar
- Ayudar a todos los  
niños
- Participación
- Información sobre  
el centro escolar

PTA provides an opportunity to suggest change more effectively at your child's school, by providing a place to collaborate, share ideas, concerns, and experiences with other parents, educators, and children.

It is a powerful statement that we have PTA volunteers at the state level that are full time advocates in Sacramento for every issue that affects our children.

PTA provides an opportunity for individual involvement in all areas of the wellbeing of children and youth.

PTA provides an opportunity to learn what is happening at school and gives you the chance to gain valuable experiences. There's no better way to know what's happening in your school than to be a part of PTA. Regularly scheduled meetings are an opportunity for you to share information with other members.

And Because PTA is a forum for exchanging ideas, you are encouraged to make suggestions.

It's also an opportunity to put your skills and hobbies to good use for a good cause – not just for your child but for all children in the community

## Why PTA?

### PTA = Support

- Guidance and Resources
- Practical Ideas & Creative Assistance
- Timely Information
- Leadership Development

## ¿Por qué PTA?

### PTA = Apoyo

- Orientación y recursos
- Ideas prácticas y asistencia creativa
- Información oportuna
- Desarrollo del liderazgo

Each local PTA is independent, but is supported by the council, district, state and national PTA structure that provides resources, training and guidance.

Some resources include:

The PTA Toolkit,

TOTEM the Electronic Membership System

And Various publications such as: PTA in California and Sacramento Update

- But the most important resources, are the human resources with leaders at the local, district and state level to support you.

PTA has Practical Ideas - for programs which

benefit children, youth, parents and guardians from diverse communities

Creative Assistance –with support and ideas from the district PTA, as well as networking with other local PTA leaders in your area at meetings of the district board.

Timely Information is available from local, State and National PTA on how PTA can influence legislators on behalf of children, families and schools.

PTA provides Leadership Development to promote individual growth and strengthening of skills. The annual California State PTA convention and our Ninth District PTA Leadership Conferences have many workshops to strengthen those skills, We also offer various training and speakers at various times of the year.

PTA is Collective strength - working with people who care, who share concerns and help bring about solutions

## Why PTA?

### **PTA = Established Financial Safeguards**

- Procedures
- Insurance
- Tax Filing Support
- myPTEZ

## ¿Por qué PTA?

### **PTA = Garantías financieras establecidas**

- Procedimientos
- Seguros
- Apoyo a la  
declaración de  
impuestos
- myPTEZ

With PTA, you are never alone. PTA developed and refined effective financial procedures. Every year, PTA trains thousand of volunteers to use these procedures to maximize and protect the assets of each association.

Following PTA's financial procedures protects the organization against embezzlement, theft and government penalties and fines. In addition, PTAs are better positioned to apply for and receive grants and to participate in hundreds of new and innovative programs that support your efforts on behalf of children.

All PTAs are required to participate in the

insurance program of the California State PTA. Because we are a large group (over 3000 in California) we can negotiate low-cost insurance for the officers and the volunteers. PTA insurance includes General Liability, Worker's Compensation, Directors and Officers and Bonding coverage.

PTAs have access to tax-filing support to ensure all state and federal nonprofit reporting requirements are met

California State PTA has a program called myPTEZ Accounting Online. myPTEZ strengthens financial controls and procedures, generates financial reports customized for PTA including information for the IRS 990 and the California Form 199 tax returns. This program is offered at a nominal cost to PTAs.



## Why PTA?

### **PTA = Volunteer Power**

- Training and Resources
- Networking
- Partners for Student Success

## ¿Por qué PTA?

### **PTA = Poder de los voluntarios**

- Formación y recursos
- Red de contactos
- Socios para el éxito de los estudiantes

PTA provides extensive training.

PTA demonstrates how one person can make a difference by working with others and within the PTA network.

PTA reflects professionalism of its volunteers.

PTA organizes, trains, and provides resources for hard-working dedicated volunteers so, parents are ready to work as partners for student success.

## Why PTA?



## ¿Por qué PTA?



Local PTAs have access to ready-made, easy to use programs with proven results like :

The Reflections Art Program, a National PTA arts recognition program that helps students explore their own thoughts, feelings and ideas, develop artistic literacy, increase confidence, and find a love for learning through the arts. National PTA Programs provide access to engaging, educational and fun opportunities that inspire, recognize and impact all students and their families.

- School of Excellence
  - Reflections
- STEM + Families

- Family Reading Experience
- PTA Connected
- Healthy Lifestyles
- Connect for Respect

And

California State PTA

#### □ Scholarships

Graduating High School Senior Scholarship

Continuing Education Scholarship for School Staff Members

And Continuing Education Scholarships for PTA Volunteers

#### □ School Smarts: Available to school communities interested in promoting family engagement in their community.

School Smarts, the California State PTAs premier program of family engagement, graduating hundreds of parents each year

#### □ There are also Grants and Awards available yearly

If your PTA is researching a new outreach program, or perhaps expanding on current success... apply for California State PTA's program grants.

these unique annual grants are geared to support local PTAs in developing programs and projects.

And Ninth District PTA also provides yearly grant opportunities for your PTA.

From health and safety, to collaborating with teachers and community members, to fundraising, PTA programs get results.

## PTA Is Unique Because

- PTA continues to be the largest and strongest volunteer organization in the state and nation that advocates on behalf of children, youth and families.

## PTA es Única Porque

- La PTA sigue siendo la mayor y más fuerte organización de voluntarios del estado y de la nación que aboga por los niños, los jóvenes y las familias.

**PTA continues to be the largest and strongest volunteer organization in the state and nation that advocates on behalf of children, youth and families.**

## PTA...

By being  
involved at  
your child's  
school you will  
be part of the  
solution,  
helping make  
positive  
changes.

Al estar  
involucrado en  
la escuela de  
sus hijos será  
parte de la  
solución y  
ayudará a  
hacer cambios  
positivos.

**By being involved at your child's school you will  
be part of the solution, helping make positive  
changes.**

Questions?

¿Preguntas?



Any questions so far?

If you think of questions later, please contact me!

Anne Emfinger, [leadership@ninthdistrictpta.org](mailto:leadership@ninthdistrictpta.org)

What's next?

There are several  
steps to formally  
organize a PTA...

¿Qué es lo  
siguiente?

Hay varios pasos  
para organizar  
formalmente una  
PTA...

What's next? There are several steps to  
formally organize a PTA...



## Volunteers Needed!

- Bylaws committee (3 to 5 volunteers)
- Steering committee (3 to 5 volunteers)
- Nominating committee (3 to 5 volunteers)

## ¡Se necesitan voluntarios!

- Comité de estatutos (De 3 a 5 voluntarios)
- Comité directivo (De 3 a 5 voluntarios)
- Comité de nominaciones (De 3 a 5 voluntarios)

The next part is the most important to organizing a PTA...You

We need volunteers to serve on these committees!

**Please sign up to serve on one or more of these important committees. The Google link is in the chat.**

**Bylaws committee**

**We need 3-5 volunteers to serve on this**

## **important committee.**

- One of the requirements to starting a non-profit is to create a legal document known as “bylaws.” PTA provides a basic template for this step.

Unit bylaws are completed in this committee, for adoption at the PTA organization meeting.

- Bylaws are written in coordination with the district PTA parliamentarian.
- This committee will decide on membership dues, unit officers, meeting dates and other information specific to the unit PTA, including the name of the new PTA.
- The district PTA provides a pre-printed bylaws template with PTA information that is in line with requirements regarding 501(c)3 regulations, PTA policies and California Corporations Code.
- Bylaws are available in an English/Spanish version to meet the needs of your community.

## **Steering committee 3-5 volunteers needed.**

To have a successful organization meeting, the Steering Committee works on the advertising of the organization meeting in cooperation with the district PTA, site administrator and or staff.

The organization meeting must be well advertised to ensure the greatest possible attendance to vote on the formation of your new PTA!

**Nominating committee 3-5 volunteers are needed to serve on this very important committee.**

**Please sign up to serve on one or all of these important committees. The Google link is in the chat.**

The nominating committee meets, after the bylaws committee has completed the bylaws, to nominate people to be officers of the association (your unit). They are charged with finding volunteers to be elected to office.

The PTA officer election is held at the organization meeting.

The nominating committee chairman reads the report of the nominating committee at the organization meeting.

There is a requirement of no less than 3 primary officers ( a president, secretary, and treasurer.) Other officers are also needed to share in the work of a well-run PTA.



## Final Step

- Organization meeting

## Paso final

- Reunión de la organización

Once there are officers nominated, we move onto the final step in the organization process...the organization meeting.

## Organization Meeting

- Motion to organize a PTA,
- Adoption of bylaws,
- Membership - dues are collected and membership cards are distributed,
- Election of officers.

## Reunión de la organización

- Moción para formar una PTA,
- Adopción de los estatutos,
- Membresía - se recaudan las cuotas y se distribuyen las tarjetas de membresía,
- Elección de funcionarios.

This meeting is chaired by Ninth District PTA leadership and includes the following basic steps:

- a) A Motion to organize a PTA,
- b) The Adoption of the unit bylaws,
- c) A Membership campaign – membership dues are collected, and membership cards are distributed.

All members who join at this meeting are charter members of the PTA. Charter members are very special members.

You only receive charter membership once and only if you join the PTA at the organization meeting.

- d) And finally, we conduct the Election of the

PTA officers.

**This meeting requires that a minimum of 15-20 people be present to become members of the PTA and vote the day or night of the meeting.**

## ¿Quieres una APA?



Now that you know the power of PTA are you interested in what's next?

**□ Here's your chance... give a thumbs up or a reaction, a clap, a wave, an emoji if you want to move forward and organize a PTA.**

This requires parent support to do the work to maintain this small business. Are you in?



## Volunteers Needed!

- Bylaws committee  
(3 to 5 volunteers)
- Steering committee  
(3 to 5 volunteers)
- Nominating  
committee  
(3 to 5 volunteers)

## ¡Se necesitan voluntarios!

- Comité de estatutos  
(De 3 a 5  
voluntarios)
- Comité directivo  
(De 3 a 5  
voluntarios)
- Comité de  
nominaciones  
(De 3 a 5  
voluntarios)

To move forward, it's up to you.  
We need volunteers to serve on these  
committees.

**Bylaws committee  
Steering committee  
Nominating committee.**

**Please sign up to serve on one or more of  
these important committees if you're  
interested in bringing PTA to your school.  
The Google link is in the chat.**

Questions?

¿Preguntas?



Are there any questions before we end the meeting?



Anne Emfinger, Ninth District PTA  
[leadership@ninthdistrictpta.org](mailto:leadership@ninthdistrictpta.org)

If you think of questions later, please contact me.

Anne Emfinger, [leadership@ninthdistrictpta.org](mailto:leadership@ninthdistrictpta.org)



Thank you for  
attending  
today. I look  
forward to  
bringing PTA  
to your school!

Gracias por  
asistir hoy.  
Espero  
poder llevar  
la PTA a su  
escuela.

Thank you for attending today. I look forward to  
bringing PTA to your school!

Meeting adjourned at: