



Legislation & Advocacy Handbook

May 2021

BURBANK COUNCIL PTA LEADERSHIP IN-SERVICE TRAINING

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RESOURCES

Many resources are available to make your job easier. The PTA Toolkit has valuable information and can be accessed at the PTA website at toolkit.capta.org. Additional printed materials are provided free in the summer mailing from CAPTA. When in doubt, contact your counterpart at the council PTA.

BURBANK COUNCIL PTA

- Website: www.burbancouncilpta.org
- Like us on Facebook at "Burbank Council PTA"
- Follow us on Twitter @BurbCouncilPTA
- Contact your Council PTA counterpart: Erin Konstantine, 3rd VP Legislation & Advocacy Email: Legislation@BurbankCouncilPTA.org

FIRST DISTRICT PTA

- Website: www.pta1.org
- Follow "First District PTA" on Facebook, Twitter @1stDistrictPTA, and Instagram @firstdistrictpta

CALIFORNIA STATE PTA

- Website: www.capta.org → Focus Areas
- PTA Toolkit: The online version of the PTA Toolkit is available at toolkit.capta.org.
- Sign up for email alerts from CAPTA (Look for the sign-up box in the sidebar of the capta.org web pages)
- Legislative Alerts (Sign up [HERE](#))
- Follow "California State PTA" on Facebook, Twitter @CaliforniaPTA, and Instagram @california_state_pta

NATIONAL PTA

- Website:
 - www.pta.org → Advocacy
 - Local PTA Leader Kit: [HERE](#) → Advocacy
- eLearning: [HERE](#)
- Sign up for advocacy alerts from National PTA: [National Advocacy Alerts](#)
- Follow "National Parent Teacher Association" on Facebook, Twitter @NationalPTA, and Instagram @nationalpta

ABOUT PTA

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA believes parents are more than fundraisers. No amount of fundraising equals the impact of a single piece of legislation!

In both schools and communities, PTA volunteers are recognized as leaders and advocates. PTA includes an ever-changing set of volunteers, and developing leadership skills in these volunteers is an important step toward creating successful activities and programs and managing the business needs of the PTA.

When PTAs offer programs, activities, and events for families to actively participate in school life, it helps to improve student outcomes and school performance from preschool to high school.

PURPOSE OF THE PTA

- To promote the welfare of children and youth in home, school, community, and place of worship
- To raise the standards of home life
- To secure adequate laws for the care and protection of children and youth
- To bring into closer relation the home and the school so that parents and teachers may cooperate intelligently in the education of children and youth
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education

MISSION STATEMENT

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

CALIFORNIA STATE PTA CORE VALUES

- The California State PTA is a professional, nonprofit, volunteer organization committed to the well being of all children.
- We believe every adult has a responsibility to ensure that all children develop to their full potential.
- We believe parents are children's first teachers and that parent involvement is essential throughout a child's educational experience.
- We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways.
- We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.

JOB DESCRIPTION – LEGISLATIVE ADVOCACY CHAIRMAN/VP

PTA is a child advocacy association. Its legislative mission is to speak on behalf of all children and youth at the local, state and federal levels. One of the Purposes of PTA is “to secure adequate laws for the care and protection of children and youth.” PTA promotes and encourages legislative advocacy for the education and welfare of all children and youth.

Role of PTA in Legislation

As local officers of the largest grassroots child advocacy organization in the state, PTA legislative advocacy chairs are responsible for demonstrating leadership on children’s issues at the local level by educating PTA members, community members, and elected officials about PTA’s issues of concern and legislative priorities and goals.

California State PTA takes positions on issues/legislation based on position statements in the *California State PTA Toolkit*, California State PTA resolutions, California State PTA Legislation Platform and National PTA positions and resolutions.

The unit, council, or district legislative chair provides PTA members with information about PTA positions on current legislation and issues.

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What to Do

In order to ensure your success, regardless of your level of legislative experience, we have broken out the “What To Do” sections by “Newcomer,” “Continuing,” and “Advanced.” Please go to the section that best fits you, and remember to incorporate the newcomer and continuing actions even when you’re advanced!

Remember: No amount of fundraising can have as much impact as a single piece of legislation.

Newcomers to Advocacy

Please obtain materials from your predecessor and/or unit/council/district president. If no materials are available, please begin a new procedure book.

If you are new to advocacy, we encourage you to do the following:

- **Request that advocacy is on the agenda of every meeting and give a legislative report.** Share with PTA members about issues affecting the school and community as well as legislative activities at all levels of government. Remember we are a nonpartisan association, so please be objective and factual. Be sure to include PTA positions when appropriate. Circulate materials from council, district, State, and National PTA when available. Have copies at PTA meetings or information on websites or links where the information can be found.

- **Write articles for your PTA newsletter.** Please observe Legislation Policy 11 ([Legislative Policies and Procedures](#)) which discusses guidelines for sending materials home with students.
- **Schedule at least one meeting per year with your elected representatives** to discuss your PTA's local issues of concern and legislative priorities of California State PTA. Take a few members from your PTA with you.
- **Participate in one of the following:** a letter writing campaign, a postcard campaign, a rally to support a PTA position.
- **Attend some local school board meetings.** Communicate advocacy positions as authorized by your PTA board.
- **Establish a method for sharing PTA Legislative Alerts** and other important information with PTA members.
- **Take Action on Legislative Alerts** from California State PTA and National PTA and encourage other PTA members to do the same.
- **Maintain current contact information for all elected representatives** in your area: U.S. Senators, U.S. Congress member, State Senator, State Assembly member, Board of Supervisors members, city council members, and school board members.

Feel free to take advocacy actions from the other categories at any point that you feel ready.

Continuing Advocacy and Education Efforts

If you have served as the legislative advocacy chair for one to two years at the unit or council level, you will likely be ready to take your advocacy to the next level. Please continue with all your newcomer advocacy actions and also add as much of the following as possible:

- Organize a voter registration drive annually. Remember to include new residents and high school seniors.
- Organize a letter-writing, email or call-in campaign to communicate legislative priorities to legislators one to three times per year. Provide a sample letter, email or phone script.
- Encourage PTA members to attend meetings with State Assembly and Senate representatives, meet with local government officials (e.g., school board and city council members, county supervisors), and know the local policies and ordinances affecting children and youth.
- Schedule at least one public appearance of unit, council, or district representatives to highlight California State PTA's legislative priorities and local issues of concern. Some examples of appropriate forums are school board meetings, the local chamber of commerce, and meetings of local service clubs.
- Submit at least one letter each year to the editors of local newspapers on behalf of your PTA highlighting California State PTA's legislative priorities and local issues of concern (with signature of district, council or unit president).
- Train your members to be advocates.
- Visit Sacramento with other PTA members to meet with elected representatives and key education leaders.
- Invite legislators/policymakers/elected officials to visit a local school.
- Establish contacts with local individuals, groups, organizations and agencies to develop sources of information on local and statewide issues that affect the school, families and community.

Please consider advancing to the next level of PTA by volunteering to serve on your council advocacy team or your district advocacy team.

Advanced Advocacy and Community Education Efforts

If you have been serving as an advocate for several years, you will be ready to go to the advanced level. Please continue with all your *newcomer and continuing advocacy efforts* and also add the following:

- Meet with federal legislators, when they are in their local district offices.
- Host a presentation on advocacy issues. Invite a council or district PTA counterpart to present.
- Organize a rally to highlight a key PTA issue. Invite legislators and other speakers, as well as the press.
- Invite the press to PTA advocacy events and publicize PTA advocacy activities and positions.
- Organize a candidates forum, working with PTA council and other local community organizations, such as the League of Women Voters, to sponsor nonpartisan candidates forums preceding elections. (See *Toolkit*, [Election Campaigns and the Role of PTA; Nonpartisan Policy](#)), see [Fig. A-2](#).
- Consider authoring a resolution on an issue of concern to your PTA to submit through appropriate channels to California State PTA or National PTA. (See *Toolkit*, [Resolutions Process](#))
- Provide leadership and support for PTA-approved local school bond and parcel tax campaigns. (See *Toolkit*, [Election Campaigns and the Role of PTA](#))
- Organize/participate in a legislation study group if a local issue arises (see *Toolkit*, [How to Make a Study](#)). Consult with a council or district PTA legislation chairman to coordinate efforts with other PTAs in the area. Forward findings to appropriate people, if study involves a district PTA or state issue.

HOW TO STAY INFORMED

Sign up to receive regular email updates from:

- Your school district
- Your PTA council
- Your PTA district
- California State PTA – www.capta.org
- National PTA – www.pta.org

Events to Attend

(Attend as many as your schedule allows.)

- California State PTA Legislation Conference in Sacramento
- California State PTA Convention
- Council/district PTA-sponsored visits to Sacramento and other advocacy events.
- EdSource Forum
- National PTA Legislative Conference held in Washington D.C.

Helpful Websites/Resources

California State PTA – www.capta.org

- Legislative Alerts (Sign up [HERE](#))
- *PTA in California* magazine
- *California State PTA Toolkit* (Available in both English and Spanish online, in print, or on CD)
The Advocacy chapter includes local advocacy, elections, legislative program, legislation platform, listing of resolutions, position statements, policies, and procedures.
- *Resolutions Book*

National PTA – www.pta.org

- PTA Takes Action Network (please sign up to receive e-mail updates on federal policy and PTA Action Alerts)
- National PTA position statements and resolutions
- Online Advocacy Toolkit, Federal public policy agenda and issue briefs
- National PTA *Quick-Reference Guide*
- *Our Children* – National PTA Magazine

California Budget project – www.cbp.org

California Department of Education – www.cde.ca.gov

California Secretary of State – www.sos.ca.gov

Ed100 – www.ed100.org

EdSource – www.edsource.org

Legislative Analyst's Office – www.lao.ca.org

Official California Legislative Information – www.leginfo.ca.gov

For any assistance that you need to help you be successful, please contact your district legislative chair, your State PTA legislative liaison, or the State director of legislation.

MAKING A DIFFERENCE FOR ALL CHILDREN: A BRIEF HISTORY OF PTA ADVOCACY

National PTA is the oldest and largest volunteer child advocacy association in the United States. But what is advocacy? For the purposes of PTA, advocacy is supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children.

PTA ADVOCACY CHANGES LIVES

Founded in 1897, PTA has a long, successful history of influencing federal policy to promote the education, health and well-being of all children—resulting in kindergarten classes, child labor laws, school lunch programs, a juvenile justice system and strengthened parent-teacher relationships.

As we look to the future and in celebration of National PTA's 120th anniversary, we honor the legacies of PTA founders Phoebe Apperson Hearst, Alice McLellan Birney and Selena Sloan Butler by sharing the stories of past advocates and present-day mothers, fathers, and families who are changing the lives of children each and every day.

PTA continues that legacy today by fighting for change under its federal public policy priorities:

- Elementary and Secondary Education
- Special Education
- Federal Investments in Education
- Early Learning and Childhood Education
- Child Health and Safety
- Gun Safety and Violence Prevention
- Juvenile Justice and Delinquency Prevention
- Education Technology and Student Data Privacy
- Postsecondary Access and Opportunity

ADVOCATING FOR STATE POLICY

State laws have a major impact on education and children's lives. Involving PTA members in state and local advocacy can play a pivotal role in securing adequate state laws, funding and policy for the education and well-being of our children.

Find your state PTA's website by viewing our [list](#) of state PTA presidents.

WAYS TO SPEAK UP

Child advocates work with policymakers at the federal, state and local levels to ensure sound policies that promote the interests of all children. Here are a few ways PTA members can influence policy:

- Work with your school to implement a strong family engagement policy, as required by federal law.

- Serve on the school board; attend school board meetings.
- Attend school district meetings on such topics as healthy alternatives in the lunchroom and federal, state and local budget cuts.
- Work with school leaders and state education officials to implement PTA's National Standards for Family-School Partnerships.
- Write a letter to the editor about the importance of family engagement in education.
- Become active with your state PTA's efforts on state-level advocacy.
- Sign up for the [PTA Takes Action Network](#) and respond to action alerts to reach your legislators on important issues and legislation.
- Educate members of Congress and their staff on PTA's federal public policy priorities.
- Meet with decision-makers at the local, state or federal level.

PTA LEADERS ARE ADVOCATES

Have you ever spoken to a teacher or principal about a problem you wanted to help solve or issue you wanted to help address? **That is advocacy.**

PTA helps you gain the skills and get the resources you need to advocate to improve the lives of children in your school and in your community. Whether you're a new parent or experienced leader, California State PTA can help you make a difference in the lives of children.

ADVOCACY GOALS

Represent, inform and mobilize members and the public to advocate for the education, health, safety and well-being of all children

RESOURCES HELP YOU ADVOCATE FOR KIDS

- [Focus Areas](#) — Learn more about the issues that matter most to you, your members and school community.
- [Toolkit](#) — Our handy online Toolkit outlines advocacy duties and issues.
- [Sacramento Update and Legislative Alerts](#) — [Sign up](#) to get advocacy news from our state and national capitals.
- [Advocacy Resource Notebook Web Page](#) — A new resource to help your local advocacy work at any level.
- [Advocacy Leadership Guide](#) — Designed with council and district advocacy leaders in mind.
- [Resolutions](#) and [Position Statements](#) — These materials act as touchstones for our advocacy work.
- [Legislation Conference](#) — Whether you're a newcomer or seasoned advocate, this event helps you raise your voice with more confidence. Get up to speed on the latest issues, meet with experts and legislators, and learn new skills to connect families and schools — all while becoming a more powerful advocate for children.
- [Annual Convention](#) — The convention's *the* place to get the latest information on key issues, build the skills to strengthen your school and community, connect with PTA leaders and have fun!

NONPARTISAN POLICY

PTA must never support or oppose political parties or candidates, including those running for school boards on nonpartisan slates. However, PTA may adopt a position expressing its support for or opposition to issues dealing with the health, safety, education, or general well-being of children and youth, but only to the extent permissible with respect to the requirements of each PTA's tax-exempt status. Nothing in the law or in PTA bylaws prohibits members as individuals from exercising their civic responsibilities in personal and partisan ways, including running for office.

PTA must never support or oppose political parties or candidates, including those running for school boards on nonpartisan slates.

One of the Purposes of the PTA is “to secure adequate laws for the care and protection of children and youth.” It is by educating its members – and through them, the general public – on issues affecting children and youth, that PTAs can best influence the course of action of those who make policy decisions, thereby achieving the Purposes of the PTA.

PTA units may be involved in legislative activities.

- By supporting or opposing local issues that affect children or services to children in their respective communities based upon a study of the issue and a vote of the association; and
- By supporting California State PTA positions on legislation needed to achieve the Purposes of the PTA.

In order for PTAs to retain tax-exempt status and continue to receive tax-deductible contributions, under Internal Revenue Code (IRC) Section 501(c)(3), they may not (1) devote more than an insubstantial part of their activities to influence legislation; (2) participate in any political campaign on behalf of or in opposition to a candidate for national, state, or local public office.

A unit's failure to comply with these restrictions may endanger council, district, State, and National PTAs' IRC 501(c)(3) status. For further information on IRS reporting requirements and options, see [Election Campaigns and the Role of the PTA](#).

Policies of the PTA as an organization are in no way intended to infringe on any member's rights as an individual.

See *Bylaws for Local PTA/PTSA Units*, Article III, Sections a, b, and c, and the *National PTA Quick Reference Guides* for detailed information on the basic policies.

The PTA is a noncommercial, nonsectarian and nonpartisan organization.

Partisan, as defined by the PTA, includes any election involving a candidate — even for “nonpartisan” offices such as a school board or city council.

A PTA LEADER’S ROLE IN ELECTION ENDORSEMENTS

PTA members are often the individuals with the most knowledge and awareness of their communities’ needs. Their community activities qualify them to take leadership roles in election campaigns. However, PTA leaders who are considering taking a leadership role on behalf of a candidate are strongly urged to avoid even the appearance that their private activities have, in any way, the endorsement, approval, or support of PTA. Discretion must be used by the current PTA president, because he/she is the official spokesperson for the PTA organization.

Activities on behalf of any candidate must be conducted separately and apart from any activities of the PTA association. **A current PTA officer/board member may not use his/her title or the name of the PTA to endorse:**

- **a ballot measure on which PTA has not taken a position; and**
- **any candidate even for purposes of identification in print, electronic, or website candidate literature (e.g., campaign mailer, ballot statement, candidate stationery).**

A current or former PTA officer/board member must not use his/her title, the name of the PTA or the trademark of PTA in any election venue unless authorized by a vote of the association, following a study of the issue.

Although federal election regulations do not prohibit the use of organizational affiliation for identification purposes, the California State PTA sets a standard which is higher than law. Failure to comply may result in a violation of California State PTA policy.

For the purpose of this policy, all elections involving candidates are defined as partisan elections, even those for “nonpartisan” offices such as school board or city council.

Use of a PTA’s name or the PTA trademark with participation in any partisan activity will endanger PTA’s nonprofit status.

CANDIDATES AND ISSUES FORUMS

During the course of a campaign, candidates for public office do not discuss political or legislative matters at PTA meetings unless appearing at a candidates forum, where all candidates for designated offices have been invited to speak.

PTAs may conduct candidates forums alone or as part of a coalition with other nonpartisan groups. All candidates for a specific office must be invited to present their views. Whether or not a candidate chooses to appear is the decision of each candidate. A nonpartisan moderator should be in charge of the meeting, and fair procedures must be established and agreed to in advance. Similar procedures should be followed for an issues forum (For more information see [Local Candidates Forum](#) and [Organizing a Local Candidates Forum](#), Figure 4-3).

PTA LEADERS SEEKING ELECTION TO PUBLIC OFFICE

The California State PTA recognizes the fact that the experience and interest gained by its members through participation in PTA activities make them particularly qualified to serve the community as elected officials.

PTA officers and those members who are likely to be recognized locally as being active PTA spokesmen or leaders, and who choose to enter the political or legislative arenas in their private (i.e., non-PTA)

capacities, are strongly urged to avoid even the appearance that their private activities have, in any way, the endorsement, approval, or support of the PTA.

PTA leaders who consider public office while they serve as PTA spokesmen are urged to weigh the impact their candidacy, appointment, or election could have on PTA's tax-exempt status.

Members who choose to seek public office may neither request nor receive PTA endorsement at any time but may list their PTA service as part of their qualifications.

Neither government regulations nor PTA policy prohibit unit, council, district or State PTA officers and other leaders from serving on commissions or other boards active in areas of concern to the PTA, provided that such membership is not designed to support partisan interests (i.e., those of any political party or candidate).

NONPARTISAN POLICY AND MEMBERSHIP ON SCHOOL BOARDS

The California State PTA recognizes the fact that the experiences and interest gained by its members through participation in PTA activities make them particularly qualified to serve the community as members of local school boards of education.

PTA officers may serve as members of school boards as long as they do not seek PTA endorsement to support their election. If a PTA officer runs for a school board, no endorsement by the PTA should be given or implied. The inclusion of a reference to PTA service or honors on a list of the candidate's qualifications for office is permitted.

Any activity in support of any specific candidate for a school board position on the part of any local parent-teacher unit, council, district, or state PTA branch is prohibited under the nonpartisan policy of the National PTA and the California State PTA.



LOCAL ADVOCACY

Local PTA Advocacy for Children and Youth

Laws enacted by local, state and national bodies are primary sources of public policy. Securing adequate laws for the care and protection of children and youth is one of the purposes of the organization. Therefore, PTA maintains an active legislation program.

PTAs can and must participate actively in the process through which public policy decisions are made. Any unit, council, or district PTA may recommend action on legislation to the California State PTA Board of Managers.

Unit, council, and district PTAs are responsible for taking action on local issues originating in school districts, cities, regions, or counties.

advocate: To plead in favor of; defend; support or urge by argument; recommend publicly. One who pleads for or on behalf of another.

STUDY THE ISSUES

Check to see if California State PTA already has taken a position regarding your concern or a closely related issue. The Legislation Platform, Resolutions and Position Statements of California State PTA provide the basis for advocacy on issues at all levels. For information on California State PTA positions, see

- [Legislation Platform](#) (preamble, general principles and legislation planks)
- [Where We Stand: Resolutions](#)
- [Where We Stand: Position Statements](#)

PTAs cannot advocate in the name of PTA without prior PTA authority.

If there is an adopted PTA position on an issue, that position can be used as authority to advocate in the name of PTA.

If there is no prior adopted PTA position on record, the next step is to conduct a study ([How to Make a Study](#)). Your council or district PTA can provide assistance.

Present the results of the study to your members. They may vote to accept the recommendations of the study and to forward them through channels (unit to council [if in council], council to district PTA) to California State PTA. Background information and recommendations will be reviewed at each level before a vote is taken to forward the study to the next level. The unit, council and district PTA should report to each other on any action taken.

When the study and recommendations reach the California State PTA Board of Managers, they will be referred to the commission or committee responsible for the subject matter. This commission or committee may choose to prepare a position statement or resolution to present to the California State PTA Board of Managers for final action. Any action taken by California State PTA will be reported to the local unit, council, or district PTA.

The California State PTA Board of Managers may also decide to return the study to the originator to take action on the study and recommendations. If this is the case, the local unit, council or district PTA may decide to prepare and submit a resolution on this issue for consideration by delegates to the annual meeting in accordance with the procedure and timeline described in the [Resolution Process](#).

STATEWIDE AND FEDERAL ISSUES

When considering advocacy on a statewide or federal issue at the local level, the first step is to determine if California State PTA or National PTA has considered the issue and whether or not either has a position. If not, research the issue and know the pros and cons. Identify the bill number, title and sponsor(s), or the number and name of the ballot measure. Remember to personalize the issue by preparing arguments on how the bill or ballot measure will affect your local community.

Know the different groups that support and oppose PTA's position on the issue. Be an information resource and have available the following:

- Fact sheets that include background on the issue;
- A summary of the legislative proposal;
- An analysis of the bill;
- Facts and statistics that support PTA's position; and
- Surveys or opinion polls of PTA members.

Some of this information may be available through the office of the legislator sponsoring the legislation. In the case of a statewide ballot measure on which California State PTA has taken a position, California State PTA will provide an analysis of the measure, including both pro and con arguments, and resources for further study. The California State PTA legislation team is available to consult with members on legislation and/or ballot measure issues.

COMMUNICATE WITH YOUR ELECTED OFFICIALS

Promote legislative advocacy among fellow PTA members by encouraging them to build relationships with state and federal representatives. Begin by identifying the State Senator, Assembly member, and Member of Congress who represent your area. Find out more about legislators and their particular areas of interest by visiting their websites; individual websites can be accessed at www.senate.ca.gov or www.assembly.ca.gov, www.house.gov or www.senate.gov.

For local issues, identify the appropriate school board members, city council members, county supervisors, and/or county school board representatives that you will need to reach. Contact information may be found in your local telephone directory or on the websites for each local government body.

VISIT YOUR LEGISLATORS

Make an appointment to visit your state and federal legislative representatives at least once per year. Call their district offices to find out when they will be available; many state legislators spend Fridays in their district offices. Arrange for a group of PTA members to visit and share information about what is important to students and parents in your area; include students when they are available.

When visiting your elected representative, take the following steps:

- Schedule an appointment or, if the elected representative is unavailable, arrange a meeting with the aide handling the issue. When making the appointment, specify how much time will be needed.
- Draft an agenda and be sure to list the issue(s) the PTA wants to discuss. If PTA members are visiting as a group, assign each person a role. For example, one person can open the meeting, another person can be the recorder, someone else can focus the conversation back to the PTA agenda when necessary, and another person can leave literature.
- Arrive on time for the meeting. Have the group meet together immediately prior to the meeting and then go in together. Once in the meeting, immediately identify yourself and the PTA represented. During the introduction, state the issue(s) of concern. Keep the time frame in mind during the meeting.
- Be prepared to educate the legislator or aide about PTA's history and positions. Be open to questions. If you don't know the answer, politely explain that you will do some additional research and get back to them. Never give false information or assumptions. Personal credibility and the credibility of PTA are on the line.
- Ask how the legislator will vote on the issue. If the legislator is unable to make a commitment, tactfully state that you would like to know, and that you are willing to call at a later time to learn the decision. If the response is positive, respond, "We appreciate your support." If the response is negative, ask, "What are your specific objections?"
- Develop a positive relationship with elected representatives and their staff members. Communication should be a continuing exchange, not sporadic contact. A solid relationship with legislators and their staff members is an important step in building credibility and power for the PTA.

WRITE LETTERS

Letters alert elected representatives to PTA's views. A letter-writing campaign also educates PTA members about the issues and publicizes the association. Begin the campaign by identifying a coordinator, perhaps the legislation chairman or PTA president.

Determine the message. Have sample messages available to members, as well as fact sheets with the PTA position on the issue. When authorized to write on behalf of the PTA, use PTA letterhead. State the case succinctly and accurately, citing the following:

- Issue and background facts;
- PTA's position, and what PTA wants to happen (e.g., change in regulations, new legislation);
- Number of PTA members the writer represents; and
- Your involvement with the PTA and, when applicable, your PTA title (e.g., unit, council or district PTA president).
- Address the letter with proper titles; and
- Sign your full name and give your complete address, including telephone number.

Send copies of the letter to other contacts, such as key legislative committee and subcommittee members as well as the California State PTA director of legislation and, when writing about issues before Congress, to the National PTA Office of Governmental Relations.

It may also be helpful, in some cases, to send letters to the editors of local newspapers to communicate the PTA position on a particular issue to the broader community. The letter should be

submitted on PTA letterhead and signed by the president or legislation chair of the unit, council or district PTA initiating the action.

Addresses of California's State and National Elected Officials

The Honorable (name)
Governor, State of California
State Capitol
Sacramento, CA 95814

The Honorable (name)
California State Senate
State Capitol
Sacramento, CA 95814

The Honorable (name)
California State Assembly
State Capitol
Sacramento, CA 95814

The Honorable (name)
United States Senator
Senate Office Building
Washington, DC 20510

The Honorable (name)
United States House of Representatives
House Office Building
Washington, DC 20515

For more tips see [Organizing a Letter-Writing Campaign](#), Fig. A-1

FAXES

For messages that are time sensitive, faxes are a quick, effective method for making a PTA position known in writing. Most legislative offices have publicly listed fax numbers. Refer to “Write Letters” when composing the fax.

ELECTRONIC MAIL (EMAIL)

Email is another way to communicate PTA positions on legislation. Some elected representatives may not accept email attachments. Check with their offices about their email preferences before encouraging your members to email a particular representative. Refer to “Write Letters” when composing email.

TELEPHONE

Phone calls are also an effective communication strategy, particularly when timing is critical. When an elected representative's support or vote is needed within the next 48 hours, a phone call to the legislator may be the best method of communication. Use the phone to communicate PTA views. Phone the elected representative's district or Capitol office and request to speak with the member or an aide. Be prepared to:

- State your name and identify your PTA.

- Identify the bill number or the issue.
- State that you are from the legislator's district and explain the PTA position on the issue.
- Ask how the legislator expects to vote.
- Urge the legislator to vote for the PTA position.

REACHING YOUR MEMBERS

PTA members may receive the California State PTA Legislative Alerts by signing up to receive them at capta.org.

Email distribution lists and telephone trees are effective ways to mobilize many people on a particular issue. When the state president and/or the director of legislation receive information on an important issue, they may pass it on to local legislation chairmen who, in turn, can reach other PTA members in their communities.

Through the use of email distribution lists and telephone trees, within a few hours of a legislative alert or call to action, literally hundreds of letters, postcards, phone calls, faxes or email messages can be on their way to appropriate legislators.

Letters or faxes are best when time permits, but often we must react fast enough for legislators to feel the impact of the PTA lobby within hours.

PTA email distribution lists and telephone trees must only be used to share adopted PTA positions and must never be used in candidate elections.

Establishing an Email Distribution List or Telephone Tree

Email Distribution List – Collect email addresses from members within your PTA who are willing to act. Use these addresses to create an email distribution list. One message can be sent to the entire list, and members can forward it on accordingly. Provide a method for subscribers to unsubscribe from future email alerts if they choose. The legislation chairman and the PTA president are responsible for email accuracy and content. Email legislative alerts or calls to action sent by National PTA or California State PTA can be forwarded without local approval. PTA presidents must approve locally generated legislative emails before distribution to local members.

Telephone Tree – Create a list of names and phone numbers of PTA members within your local area who are willing to take action.

Establish the calling sequence. Select “lead” callers. A lead caller should make no more than five calls.

Last caller in sequence should return a call to a “lead” caller.

If there is no answer after several tries, the caller should go on to next in sequence.

Do not count on answering machines to deliver messages in a timely manner.

Distribute a copy of the entire telephone tree to all involved. Duplicate and distribute legislation materials from California State PTA, the council (if in council) and district PTA.

Tips on Effective Communication Using Email Distribution Lists and Telephone Trees

Have a system to check the effectiveness of email distribution list or telephone tree communications. Is the list or tree functioning efficiently? Are there problems needing adjustment?

Send emails or make your calls to legislators before using your email distribution list or activating the telephone tree. Your personal experience in communicating the message will alert you to any problems with the way you are presenting the message.

Make a list of “talking points,” messages you want your PTA members to communicate to their legislators. Include bill number, author, subject matter, location of bill in the legislative process and the PTA position.

It is important that the same message is delivered each time.

By using an email distribution list or activating a telephone tree, the PTA unit can dramatically increase the number of contacts with legislators. It is important they hear from PTA. Legislators need to be reminded about priority issues.

Update email distribution list addresses and telephone tree phone numbers frequently. Explore ways to expand your email list.

PTAs are encouraged to explore other media communication tools such as texting, social networking sites or blogging, considering PTA publication guidelines.

FOLLOW-UP

Following action on a bill, send the legislator your thanks via email, postal service or fax if the vote or action was favorable, or a polite expression of disappointment if the legislator voted against the PTA position. Appreciation can be expressed in other, more public ways as well, such as writing letters to the editor of the local paper. Keep the PTA name visible.

PUBLIC APPEARANCE

Another method of bringing attention to issues of concern to your local unit, council or district PTA is to schedule public appearances of PTA representatives. Appropriate forums may include regular meetings of the local school board, chamber of commerce, or service clubs such as Rotary or Kiwanis. These venues provide an opportunity for an authorized representative of the PTA unit, council, or district to share the PTA position on particular issue(s) of concern with other community members.

ORGANIZE A RALLY

To raise awareness and engage your members in a particular issue, you may wish to organize a local rally. Invite elected officials and other experts to speak, as well as the press. For more information on holding a rally, see [How to Organize a Local Rally](http://toolkit.capta.org/advocacy/how-to-organize-a-local-rally/).

(<http://toolkit.capta.org/advocacy/how-to-organize-a-local-rally/>)

CAPTA LEGISLATIVE PROGRAM

PTA LEGISLATION TEAM

The legislation team includes the director of legislation and legislative advocates, who specialize in specific issues regarding education, family engagement, budget, community concerns, and health, as these affect children and youth, as well as a federal advocate. All members of the legislation team are PTA volunteers who serve on the California State PTA Board of Managers.

The director of legislation manages the California State PTA legislation program and works on bills that do not fit into one of the subject matter categories. These include matters such as taxation and budgetary reform.

The advocates work directly with state legislators and their staffs; with members of allied organizations; and with other interested parties on bills selected for PTA advocacy.

Commissions are responsible for preparing background information and authority for bills in their subject matter area and for recommending appropriate action. Advocates select bills that are sent to members of the legislation action committee for detailed study.

The legislation action committee meets several times each year during the legislative session to discuss the bills and subject matter commission recommendations and to determine positions to be taken on each of the selected bills. After the committee meets, a Legislation Action Report is prepared and distributed. Current status on legislation for which PTA has taken positions can be viewed in the Advocacy section of the California State PTA website (Current Legislation).

Once a position has been adopted, the legislation team is responsible for all further actions on the legislation. This includes relaying information on PTA positions to legislators and communicating PTA action on legislation-related matters to the constituent associations of California State PTA.

LEGISLATION PROGRAM

The PTA membership, through the association's bylaws and the actions of delegates at California State PTA conventions, directs PTA actions on legislation. The California State PTA Board of Managers is responsible for conducting the affairs of the association. This includes all action on state legislation and state ballot measures. Specific activities include:

- Analyze legislation under consideration in the California Legislature and measures that will appear on statewide election ballots.
- Take PTA positions on specific bills and ballot measures as directed by the PTA legislation platform, policies, resolutions and position statements.
- Advocate for passage or defeat of selected measures.
- Work cooperatively with allied organizations or others concerned about children's issues when appropriate.
- Inform members about PTA positions on current legislation and on statewide ballot measures and encourage local actions when needed.

PTA follows IRS and California Fair Political Practices Commission rules on advocacy.

Action on Legislation

Action on Legislation is an integral part of PTA work. California State PTA action on legislation and ballot measures is based on the legislation platform, California State PTA position statements, and California State PTA and National PTA resolutions. The National PTA and California State PTA, as advocates for children and youth, carry out an active, effective legislation program.

Authority for PTA Action on Legislation

The California State PTA legislation platform lays the specific framework for PTA action on legislation. The platform, adopted every two years (even-numbered years) by delegates at the California State PTA Convention, establishes authority and direction for deciding what measures PTA should select for action on legislation. It defines the fields of PTA interest and the scope of legislation appropriate for PTA action.

California State PTA legislation policies, adopted every two years (odd-numbered years) by California State PTA convention delegates, guide how action on legislation may be taken by California State PTA and its unit, council and district PTAs. Procedures are adopted by the California State PTA Board of Managers.

The California State PTA legislation platform and policies direct that legislation and ballot measures selected for action by California State PTA must:

- affect the education, health, and well-being of California's children and youth;
- be of statewide significance; and
- fit within the Purposes of the PTA association and the framework of the legislation platform and be consistent with recorded PTA positions.

Sources of authority and direction for specific PTA positions on legislative bills and statewide ballot measures include:

- Resolutions adopted by California State PTA convention delegates;
- The legislation platform principles and planks;
- Position statements and resolutions adopted by the California State PTA Board of Managers;
- National PTA resolutions;
- National PTA Board of Directors position statements and legislative directives;
- Previous PTA action on the issues; and
- Purposes of the PTA.

CALIFORNIA STATE PTA LEGISLATIVE BILL POSITIONS

For legislative bills that have significant impact on children and youth, and that fall within the framework of the legislation platform, priorities, and current PTA positions, California State PTA may adopt one of the following bill positions:

Support: Legislation considered to be of great importance and beneficial to the welfare of children and youth. Will work actively to seek passage of these bills.

Oppose: Legislation considered to be very harmful to the welfare of children and youth. Will work actively to seek defeat of these bills.

Oppose Unless Amended: Legislation that contains some provisions in conflict with established PTA positions. The California State PTA legislative advocate will work with the bill's author to amend the bill. If the bill is amended so that it no longer is objectionable, PTA will change its position.

Support if Amended: Legislation PTA would support, except that it contains a part (or parts) PTA would like changed. If the bill is amended to accommodate the PTA concern or recommendations, California State PTA will work to secure its passage.

Seek Amendments: Legislation that addresses an important PTA issue, but which would require amendments to receive full support or removal of opposition from the PTA. Legislative advocate(s) will work with the author and with allied organizations to secure appropriate changes.

Approve: Legislation that PTA could support but does not actively seek passage of because the bill is not currently a high priority for PTA action or does not need active support from California State PTA.

Watch: Legislation that could be important, but the bill is not complete, or the author intends to work further on the bill through amendments. PTA chooses to monitor the progress of the bill. Future amendments to the bill could result in PTA taking an active position.

When a bill has been amended so that the content is changed significantly, the bill is re-examined to determine if the content is still appropriate for PTA action on legislation, and whether a change in position is warranted. If the content is no longer within the scope of PTA action on legislation, the PTA position is dropped.

Positions on State Initiatives and Propositions

Support: The initiative is considered to be of great importance and beneficial to the welfare of children and youth. Will work actively to seek passage of it.

Oppose: The initiative is considered to be very harmful to the welfare of children and youth and is in conflict with the Purposes of the PTA. Will work actively to seek defeat of the initiative.

Neutral: The initiative may be relevant to the welfare of children and youth, but after careful analysis, California State PTA has chosen to neither support nor oppose this particular initiative due to either lack of existing specific authority or conflicting authorities. Will not support or oppose passage of the initiative.

ELECTION CAMPAIGNS

RESTRICTIONS ON ENDORSEMENT OF CANDIDATES

PTAs, as tax-exempt associations, cannot support or oppose political parties or candidates, including those running for school boards and other nonpartisan offices. Participation in these types of activities will endanger the association's nonprofit status with the IRS ([Nonpartisan Policy](#)).

A current or former PTA board member must not use his/her PTA title or the name of the PTA to endorse a candidate even if just for purposes of identification in any print, electronic, or website candidate literature, or interview or letter to the editor.

Judgment should be exercised by PTA leaders on whether privately endorsing a candidate (without using a PTA title) could negatively affect a future relationship with the elected official should a different winning candidate win.

For the purpose of this policy, all elections involving candidates are defined as partisan elections, even those for "nonpartisan" offices, such as school board or city council. Use of a PTA's name or the PTA trademark with participation in any partisan activity will endanger PTA's nonprofit status.

PTA members are not prohibited from running for public office themselves nor from listing PTA involvement as part of their biographical information and/or campaign literature

Individual candidates cannot be invited to address PTA meetings, even if they are PTA members, unless all other candidates are invited. This avoids the reality or appearance of bias or support of an individual candidate. There is no restriction on a member who is running for office from performing his or her regular PTA duties. He or she just needs to be mindful to keep PTA and campaign activities separate.

Local Candidates Forum

Since the decisions of elected officials significantly affect the well-being of children and youth, it is a PTA responsibility to disseminate as much factual, objective information as possible during election campaigns to help voters make informed choices. All voters should be encouraged to carefully evaluate each official candidate. Candidates forums provide one way to provide such information in a nonpartisan, impartial, educational environment.

PTA never supports nor opposes a candidate for public/political office but does take positions on issues that affect children and youth.

For more information on [organizing a local candidates forum](#), see Figure A-3.

CANDIDATE QUESTIONNAIRES

In addition to, or in place of, a candidates forum, another means of educating voters about candidates, is to send them a list of questions about key issues. Questioning all candidates during an election campaign is in compliance with the National PTA nonpartisan policy ([Nonpartisan Policy](#)).

Your PTA may wish to develop a list of questions to send to all candidates, and publish their responses in their entirety in unit, council and district PTA newsletters, adhering to school district policies for distribution.

Do not edit any of the responses. One may, however, request that responses be limited to a certain number of words, to ensure all responses are of similar length.

Questionnaires must be sent by certified mail with return receipt requested to all candidates; these receipts should be retained for one year after the election. Specific due dates must be set and included with the questionnaires. Any candidates not responding by the due date will not be included and should be so noted in the published materials.

SCHOOL BONDS AND OTHER BALLOT MEASURE CAMPAIGNS

PTAs may be asked to help secure the passage of a local school district facilities bond or local parcel tax election, or to participate in campaigns to pass or defeat other ballot measures. Unit, council and district PTAs may participate in these efforts when the board and/or membership has studied the issue and voted to support such a campaign.

PTAs can be most effective by:

- Participating on the school district committee to recommend to the board of education the feasibility of placing a facilities bond or parcel tax on the local ballot, and what provisions the measure should include.
- Taking an active role in planning and running the campaign.
- Providing speakers to inform the community.
- Developing and/or distributing available campaign material – but not by using student help, unless permitted by the school district ([California State PTA Legislation Policies and Procedure No. 11](#)).
- Making use of radio, TV, and print media, including newsletters, editorial board visits, letters to the editor, and other communication resources such as PTA email and Web pages.

LEGAL GUIDELINES FOR CAMPAIGN ACTIVITY

California State PTA and all of its constituent associations are classified as tax-exempt nonprofit associations under the federal Internal Revenue Code Section 501(c)(3). State and federal laws place certain requirements and restrictions on lobbying and election-related activities and expenditures by such associations. A PTA that participates in influencing or attempting to influence specific legislation or voter action for the passage or defeat of any ballot measure must comply with both the federal IRS regulations and the California state laws and reporting requirements.

IRS Regulations: To retain its IRS tax-exempt status and continue to receive tax-deductible contributions, a PTA may not participate in any type of political campaign or other activity on behalf of or in opposition to a ***candidate*** for any public office. Nor may a PTA devote more than an insubstantial part of its volunteer activity and expenditures to influence the outcome of ballot measures and other legislation. The IRS regulations do not define “insubstantial,” but it is generally interpreted to mean 5 percent or less of the association’s total expenditures and activities (including volunteer hours). Lobbying expenses must be reported on the association’s annual tax forms. Definition of what constitutes reportable lobbying is complex; contact California State PTA through channels for more information.

NONPARTISAN POLICY

To retain its IRS tax-exempt status and continue to receive tax-deductible contributions, a PTA may not participate in any type of political campaign or other activity on behalf of or in opposition to a candidate for any public office.

A current PTA officer/board member must not use his/her title, the name of the PTA or the trademark of PTA

- in any election venue unless authorized by a vote of the association, following a study of the issue.

Although federal election regulations do not prohibit the use of organizational affiliation for identification purposes, California State PTA sets a standard which is higher than law. Failure to comply may result in a violation of California State PTA policy.

IRS REPORTING REQUIREMENTS

A PTA operating as a 501(c)(3) may not devote more than an insubstantial part of its activities and budget to influence legislation. The “insubstantial part” is not clearly defined but is often interpreted to be no more than 5 percent of an organization’s annual operating expenditures.

The IRS provides another option for PTAs that choose to be more active in legislative matters. PTAs may elect 501(h) status, while retaining their 501(c)(3) status, by filing IRS Form 5768, “Election/Revocation of Election by an Eligible 501(c)(3) Organization to Make Expenditures to Influence Legislation.” This single page form can be found at www.irs.gov. Prior to electing 501(h) status, PTAs are advised to see legal and taxation professional advice.

Under the 501(h) designation, the amount of allowable lobbying expenditures is more clearly defined. For an organization with annual expenditures of \$500,000 or less, the allowable expenditure on lobbying activities is 20 percent of its total annual expenditures. Under the 501(h) designation, a PTA need not report volunteer lobbying activity for the purposes of tax reporting.

All PTAs with lobbying expenditures must report these on their *Form 990* or *990 EZ* tax returns, whether they are a 501(c)(3) or have made the 501(h) election.

CALIFORNIA FAIR POLITICAL PRACTICES COMMISSION REGULATIONS

Most PTAs are unlikely to have expenditures high enough to require reporting under California law, but it is wise to carefully account for all PTA expenditures made for any legislative purpose. Contact the district PTA president or the State office if there are questions about how California reporting laws might affect the PTA.

California law establishes procedures and requirements for filing reports on election campaign expenses. A PTA that participates in a campaign to pass or defeat any local school bond, parcel tax or local or statewide ballot measure must file a report with the State of California Fair Political Practices Commission (FPPC).

1. **Contributions* up to a total of \$1,000:** No special reporting is necessary, other than on your regular tax forms.

2. **Contributions*:**

- a. **Single donation:** Can be made in one payment in a calendar year once in five years without special reporting to the FPPC. Note: This is considered the “first bite of the apple.” Keep a

record that the five-year timeline has been triggered.

b. **Two or more donations:** The second contribution within a calendar year that would total more than \$1,000 triggers the “second bite of the apple.” The association needs to file as a “recipient committee” with the FPPC and report the donation within 10 days of the contribution. This is not very complicated but contact California State PTA if you are considering this.

3. **Contributions* of \$10,000 more:** The association must file a “major donor” report to the FPPC, an easy form.

4. **Contributions* of \$50,000 more:** The association becomes a sponsor of the ballot measure and must be named on all campaign literature

* **Contributions** refer to both monetary and in-kind contributions made in a calendar year on any combination of ballot measures.

Note: Keep in mind that 501(c)(3) associations are entitled by law to lobby on ballot measures (not candidates). The reporting forms are relatively simple.

New Campaign Reporting Rules for PTAs — effective July 1, 2014

For more information on reporting requirements, go to www.fppc.ca.gov.

CALIFORNIA EDUCATION CODE AND ELECTION LAW

School district ballot measures fall under special laws limiting use of school facilities and resources for campaign purposes. Check with California State PTA to ensure that you stay within the rules.

For additional information on state legislation and ballot measures, contact the California State PTA Director of Legislation at legislation@capta.org or 916.440.1985 ext. 311.

CAPTA RESOLUTIONS

RESOLUTIONS PROCESS

<http://toolkit.capta.org/advocacy/resolutions/convention-resolutions-process/>

New business (other than amendments to bylaws or the Legislation Program) is brought before the convention through the resolutions process.

When adopted by the California State PTA convention delegates, a resolution becomes an official PTA position which provides authority and direction for action by California State PTA and its constituent associations. A new resolution in conflict with one already adopted shall not be introduced, unless the former resolution is first rescinded. If the motion to rescind is adopted but the new resolution is defeated, the convention delegates shall be given an opportunity to readopt the previously rescinded resolution by majority vote.

Resolutions remain in effect as current positions for at least 10 years, unless they are rescinded or replaced by a newer version by convention delegates or designated as historical record by the California State PTA Board of Managers.

Resolutions are designated as historical record when one or more of these are true:

1. The intent has been fully carried out.
2. The same subject has been expanded or updated by other resolutions.
3. It is no longer appropriate to PTA concerns.
4. It was applicable only to a specific past program, event or circumstance.

Resolutions adopted more than ten years earlier may be designated as historical if they have not been resubmitted to convention delegates or reviewed and deemed relevant as a current position by the California State PTA Board of Managers. A vote by the Board of Managers must be taken to rescind resolutions or to designate resolutions to the historical record.

Criteria for Resolutions:

Each resolution submitted to California State PTA for consideration and possible action by convention delegates shall meet the following criteria:

1. Concern a field of interest of California State PTA;
2. Be in harmony with the Purposes and basic policies of the PTA;
3. Concern a matter which is statewide in scope;
4. Be accompanied by resource material which validates the statewide concern and “whereas” statements (Where We Stand: Resolutions, Position Statements);
5. Include a brief summary, table of contents, bibliography and index listing the resources to validate each whereas; and
6. Be written in appropriate resolution format and submitted in accordance with all specifications set by the California State PTA Board of Managers.

Submitting Resolutions:

For important information on writing and submitting a resolution, refer to the California State PTA publication “*Procedure for Preparing a PTA Resolution*”. This document may be obtained on the California State PTA website (capta.org), or upon request to the California State PTA office by telephone, or via email to resolutions@capta.org.

A resolution should be submitted only by association vote of a PTA unit, council, or district in good standing; by a PTA inter-district committee with the approval of the majority of districts concerned; or by the California State PTA Board of Managers.

Reminder: A resolution being carried forward from a previous PTA administration must be reviewed and deemed relevant by the current administration or voting body of the PTA association.

Any unit, council or district PTA planning to prepare a resolution for convention must submit a draft resolution, background summary, and initial list of resources to the California State PTA office no later than 5:00 p.m. on November 1. DRAFT resolution materials may be delivered, faxed or emailed and must be submitted with the *Resolution Action Cover Sheet*. Approvals through channels are not required at this stage.

FINAL Resolutions from unit, council, district, and inter-district PTA committees must be received in the California State PTA office no later than 5:00 p.m. January 5 * with the completed *Resolution Action Cover Sheet*. The originator’s FINAL resolution shall be transmitted through channels (Lines of Communication) for action at each level. The maker of the resolution is responsible for ensuring the FINAL resolution documents and a binder of substantiating research are submitted in written and electronic form to the California State PTA office by the deadline with the appropriate signatures.

* The submittal will be accepted on the next business day for any deadline which falls on a holiday or weekend.

Council and/or district PTAs’ executive board(s) shall review a FINAL resolution submitted by the original PTA body and shall upon review promptly take action to approve, disapprove, or choose no recommendations. This action shall be recorded on the resolution’s action cover sheet. Disapproval or lack of recommendation does not prevent the originating body from submitting a resolution to California State PTA.

The resolution maker may optionally submit the resolution to other PTA units, councils and districts for additional endorsement. Endorsement must be approved by that PTA’s executive board.

The Board of Managers should meet the same deadline for submitting resolutions as other PTA bodies; however, the California State PTA Board of Managers may find it necessary to present new business which is developed after the due date to convention delegates.

California State PTA Resolutions Committee Review and Recommendation:

The Resolutions Committee shall meet after the January 5 deadline and before the next Board of Managers meeting to review and evaluate the resolutions submitted. The Resolutions Committee may edit or adapt resolutions as necessary to make them appropriate for convention action without changing the intent. The committee will review such changes with resolution makers prior to finalizing.

The Resolutions Committee will prepare a report for the California State PTA Board of Managers explaining the recommended disposition of all resolutions submitted.

The Resolutions Committee's possible recommendations include:

- to refer a resolution to convention delegates;
- to refer a resolution to a California State PTA Board of Managers commission or committee for information or study;
- to combine two or more related resolutions;
- to return a resolution to the originating body with a written explanation of the reason(s) for the decision; or
- to refer a resolution to National PTA.

The California State PTA Board of Managers shall review the recommendations of the Resolutions Committee and decide which resolutions will be placed on the convention agenda as action items. Placement on the convention agenda by the California State PTA Board of Managers does not constitute endorsement by California State PTA. The California State PTA Board of Managers may endorse a resolution by following appropriate motion protocols.

The Resolutions Committee chair is responsible for reporting promptly to the originating PTA groups the disposition of the resolutions submitted.

Resolutions recommended for presentation to delegates at convention shall include a brief summary of background information and will indicate all actions taken by other PTAs.

Presentation of Resolutions at Convention:

California State PTA shall publish the text of each resolution in the *Convention Chronicle* with the CALL to convention. Resolutions shall also be emailed through channels, and the proposed resolutions shall be placed in the convention section of the California State PTA website.

Prior to convention, units, councils and districts are encouraged to review, discuss and vote on the resolutions to guide delegate action at convention. Delegates should be aware that a resolution could be changed at convention.

Resolutions will be presented to convention delegates for debate and vote in accordance with convention rules and regulations. Resolutions for consideration at convention will be formatted as presented and provided to all delegates. The Resolutions Committee chair shall present each resolution to convention delegates for consideration.

Time will be allocated at the state convention for delegate hearings on resolutions. Voting delegates are strongly encouraged to attend resolution hearings to ask questions or to prepare amendments.

Resolutions which have not been through the approval process may not be introduced from the convention floor.

Emergency Resolutions:

Provision is made for submitting an **emergency resolution**, if the urgency of the subject matter arose after the January 5 deadline.

- Emergency resolutions must conform to the same criteria required for all other resolutions.
- Emergency resolutions submitted by a PTA district, council, or unit shall have the approval of the originating body and the signature of the president of those constituent PTA associations (unit, council or district PTAs) through which it is transmitted to California State PTA.
- Emergency resolutions, accompanied by verification of the urgency of the subject matter, must be submitted to the Resolutions Committee for review and approved for consideration at the convention by the California State PTA Board of Directors.

Action Following Convention:

Resolutions adopted by the delegates at convention shall constitute a directive to the California State PTA Board of Managers. Resolutions shall be assigned to the appropriate commission(s) or committee(s) or to the president of California State PTA for implementation or for preparation of guidelines for further action. The commission(s), committee(s), or the president shall be requested to give these resolutions priority consideration.

The Resolutions Committee (or committee task force) shall review all adopted resolutions which are to be forwarded to the National PTA convention to ensure the resolutions meet National PTA criteria.

If delegates vote to refer a resolution to the Board of Managers, the resolutions chair shall assign it to the appropriate commission(s) or committee(s) of California State PTA for study and/or action. Any resolution not acted upon by convention delegates shall be returned to the Resolutions Committee. The Board of Managers will determine the disposition of the resolution upon receiving a recommendation from the Resolutions Committee.

A report on the implementation of the resolutions shall be given to the delegates at the next annual convention.

To find PTA Resolutions refer to (also linked below):

- California State PTA [Resolutions Book](#) or at www.capta.org/advocacy
- Advocacy Topic Index in the *Toolkit*
- List of titles in *Toolkit*, [Where We Stand: Resolutions](#)
- District PTA offices
- Resolutions Chair resolutions@capta.org, 916.440.1985 ext.

WHERE WE STAND: RESOLUTIONS

Each year delegates to the California State PTA Convention take action on resolutions that have been submitted by unit, council, district PTAs or the California State PTA Board of Managers. Resolutions adopted by convention delegates serve as a basis for action in unit, council, district PTA and California State PTA.

Resolutions adopted since 1961 are available from the California State PTA office or through www.capta.org. The starred (*) titles represent resolutions adopted by the California State PTA Board of Managers. (These were not voted upon by Convention delegates.)

[Achievement: Eliminating the Gap](#) (2009)

[Adequate and Equitable State School Finance System](#) (1987)

[Admission of Minors to R-Rated Films](#) (1981)

[Aid to Rape Victims and Their Families](#) (1977)

[Air Pollution](#) (1973)

[Alcohol and Tobacco Use in Youth: Education, Prevention and Intervention](#) (2002)

[Alcohol Beverage Advertising that Targets Youth](#) (1992)

[Alcohol-Related Driver Education](#) (1982)

[Antibiotic Resistance Awareness](#) (2001)

[Arts Education](#) (1998)

[Attention Deficit Disorder in Children](#) (1998)

[Automated External Defibrillator \(AED\) Awareness in Schools](#) (2011)

[Background Checks of Ice Cream Truck Vendors](#) (1986)

[Ballot Propositions \(initiatives\)](#) (1999)

[Ban on Drug Paraphernalia](#) (1981)

[Ban on Military Assault-Type Weapons](#) (1989)

[Ban on the Manufacture and Sale of Saturday Night Specials/Junk Guns](#) (1997)

[Bicycle Safety Education and Training](#) (1973)

[Bicycle Safety Helmets](#) (1991)

[Breakfast in Every School](#) (2003)

[Breast Cancer Early Detection Awareness and Education](#) (1988)

[Bungalow Classroom Safety](#) (1971)

[California K-12 Public School Funding Crisis](#) (1998)

[Child Trafficking in California](#) (2010)

[Citizenship Education](#) (1989)*

[Class Size Reduction](#) (1996)

[Class Size Reduction Flexibility](#) (2005)

[Climate Change is a Children's Issue](#) (2015)

[Closed Captioned TV](#) (1978)

[Community Drug Abuse Prevention Programs](#) (1970)

[Comprehensive Waste Reduction in Schools](#) (2007)

[Computer Technology in Education](#) (1983)

[Computer Workstation Health](#) (2010)

[Control of Look-Alike Stimulants and Depressant Drugs](#) (1982)

When adopted by the California State PTA convention delegates, a resolution becomes an official PTA position which provides authority and direction for action by California State PTA and its constituent associations.

Creating Lifelong Readers (1998)
Credential Requirement: Parent/Family Involvement Component (1993)
Credentialed School Nurses (2005)

Delivery of Unsolicited and Hazardous Products (1971)
Desegregation and Neighborhood Schools (1979)
Developmentally-Appropriate Physical Education (1999)
Disaster Preparedness (1986)
Drug Abuse Program Funding – Penalty Assessment (1980)
Drug Advertising (1970)
Duplicate Emergency Forms at Athletic Events (1974)
Dyslexia: Addressing the Educational Implications in Public Schools (2016)

Early Childhood Development and Education (2000)
Early Care and Education for All of California’s Children (2019)
Education: A 21st Century Vision (2005)
Education on Hazards of Involuntary Smoking (1987)
Education on Health Hazards in the Use of Anabolic Steroids (1989)
Educational Funding Crisis (1981)
Educational Technology Funding (1995)
Educational Testing and Test Scores (1971)
Educationally Handicapped Children (1972)
Electro-Magnetic Fields (1994)
Emergency School Bus Evacuation (1973)
Equal Access to School Improvement Program Funds (1983)
Equalized Base Revenue Limit Funding (1991)
Ethnic Representation in Curricula (1970)
Extended Educational Services for the Handicapped (1967)

Family Preservation: An Alternative to Out-of-Home Placement (1990)
Financial Literacy for Youth (1999)
Financing California’s Public Schools (2007)
Firearm Safety and Awareness (1995)
Firearm Safety Devices (1999)
Fireworks: Hazards to Youth (1990)
First Aid and/or Cardiopulmonary Resuscitation (C.P.R.) (1987)
Food Allergy and Anaphylaxis in Schools (2004)
Football Safety (1975)
Foster Families (1999)
Funding Sources for Adult Crossing Guards (1981)

Grade Retention (1991)

Hazardous Waste Management (1980)
Healthy Lifestyles for All Children (2004)
HIV/STD Prevention Education in Our Schools (2008)
Homeless Families with Children (1989)
Homework: Quality Over Quantity (2014)
Hot Weather Standards in the School Setting (1992)

[Immunization Awareness and Educational Programs \(1975\)](#)
[Improving and Stabilizing Education Funding \(2018\)](#)
[Improving K-12 Mathematics Education \(1998\)](#)
[Inclusive Schools Build Stronger Communities \(2013\)](#)
[Increased School Nurse-to-Student Ratios \(1997\)](#)
[Increasing Counselor-to-Student Ratio in Schools \(2000\)](#)
[Individuals with Disabilities Education Act \(IDEA\) Underfunding \(2007\)](#)
[Indoor Air Quality \(IAQ\) in Schools \(2007\)](#)
[Internet Access for California Classrooms \(2000\)](#)
[Juvenile Justice Reform – A Priority \(1983\)](#)
[Learning Disabilities and Learning Disabilities in Gifted Children \(2000\)](#)
[LGBTQ+ Inclusiveness in Health Education California \(2015\)](#)
[Licensing and Registration of Handguns \(2000\)](#)
[Limiting Concurrent Sales of Gasoline and Alcohol and the Proliferation of Outlets \(1985\)](#)
[Literacy Education \(1989\)](#)
[Local School Parcel Tax Measure Threshold Reduction \(2008\)](#)
[Longitudinal Integrated Statewide Data System \(2008\)](#)
[Lowering the 2/3 Vote Requirement on School and Library Bonds \(1999\)](#)
[Lowering the Vote Requirement in the California State Budget Process \(2009\)](#)
[Measles \(Rubeola\) Vaccinations \(1990\)](#)
[Mental Illness: Treatment and Support \(1999\)](#)
[Minimum Instruction Time \(1983\)](#)
[Mitigating Earthquake Hazards in Public Schools \(1989\)](#)
[Nonsuspension of Proposition 98 \(1991\)](#)
[Nutrition Education \(1991\)](#)
[Online Safeguards for Internet Use by Children and Youth \(1997\)](#)
[Opposition to Televised Commercials in California Classrooms \(1990\)*](#)
[Organ and Tissue Donor Awareness \(1999\)](#)
[Paintball Gun Control \(1993\)](#)
[Parent/Community Action for Effective Schools \(1993\)](#)
[Pedestrian Safety Education \(1990\)](#)
[Pesticides \(1972\)](#)
[Playground Equipment Safety Standards \(1996\)](#)
[Playground Surface Safety \(2002\)](#)
[Post Proposition 13 Funding of Public Education \(1979\)](#)
[Prejudice Awareness Education \(1989\)](#)
[Primary Prevention of Substance Abuse \(1979\)](#)
[Prohibiting the Promotion of Tobacco Products \(1987\)](#)
[Property Tax Limitation \(1978\)](#)
[Protection of Children from the Harmful Effects of Aircraft Emissions \(1998\)](#)
[Public School Governance Authority \(2007\)](#)
[Qualifications for Candidacy in California Elections \(2013\)](#)
[Quality of Life Portrayed on Television \(1979\)](#)

[Rating of PG \(Parental Guidance\) Films, The \(1979\)](#)
[Reduction of Student:Teacher Workload \(Class Size\) \(1989\)](#)
[Regulation of Liquor Licenses Near Schools \(1997\)](#)
[Regulation of the Display and Sale to Minors of Drug-Use Information and Paraphernalia Including Cigarette Papers \(1979\)](#)
[Safe Routes to School for All Children \(2008\)](#)
[Safety Helmets for Scooter, Skateboard and Skate Users Under the Age of 18 \(2001\)](#)
[Safety Problems Related to Freeway Construction Near Schools \(1970\)](#)
[Sale of Tobacco Products to Minors \(1988\)](#)
[Save Our Kids \(1983\)](#)
[School Absenteeism/Dropouts \(1986\)](#)
[School Buildings and Railroad Safety Requirements \(1990\)](#)
[School Bus Safety \(1993\)](#)
[School Construction Funding \(1986\)](#)
[School Desegregation Through Housing Integration Incentives \(1982\)](#)
[School Facilities and Public Planning \(1991\)](#)
[School Facilities Crisis \(1990\)](#)
[School Funding \(1981\)](#)
[School Library Media Center Funding Crisis \(1988\)](#)
[School Nutrition Programs: Improvement and Expansion \(1991\)](#)
[School Support Program \(1976\)](#)
[School Traffic and Pedestrian Safety Improvement \(2001\)](#)
[School Transportation \(1981\)](#)
[School Transportation: Equitable Funding \(2004\)](#)
[School-to-Career for All Students \(2001\)](#)
[Science, Technology, Engineering and Mathematics \(STEM\) Education \(2011\)](#)
[Scoliosis Screening \(1980\)](#)
[Seat Belt and Child Restraint Usage \(1983\)](#)
[Self-Esteem and Personal and Social Responsibility Awareness \(1991\)](#)
[Smoking and Health \(1964\)](#)
[Social Host Accountability and Underage Drinking \(2009\)](#)
[State Government Responsibility for a Rational Budget Process \(1992\)*](#)
[State Tax Reform \(1991\)](#)
[Strategies to Reduce School, Family and Community Violence \(1995\)](#)
[Student Assessment, Achievement and Accountability \(2000\)](#)
[Student Substance Abuse: Alternatives to Zero Tolerance \(2003\)](#)
[Substance Use and Abuse During Pregnancy \(1987\)](#)
[Suicide Prevention Education and Awareness \(1983\)](#)
[Summer Learning Loss \(2013\)](#)
[Summer School \(1980\)](#)
[Sun Safety: Skin Cancer Prevention Measures at School \(2005\)](#)
[Support and Funding for Voluntary Integration Programs \(1980\)](#)
[Support for the Civic Mission of Schools \(2006\)](#)
[Support for Quality Child Care \(1986\)](#)
[Support of Public Education, PTA Priority \(1980\)](#)
[Synthetic Marijuana – Education and Awareness \(2015\)](#)

Teacher Preparation for Elementary Education (1973)
Teacher Quality: Recruitment, Retention and Resources (2001)
Teen Driving Safety (2009)
Television Literacy and Program Accountability (1993)
Television/Screen Time Awareness (2006)
Temperature Control Standards in the School Setting (2019)
Threatening Phone Calls to Schools (1990)
Tobacco Advertising That Targets Minors (1993)
Torture Toys (1972)
Toxins (Persistent and Bioaccumulative) and Their Effects on Children (2002)
Treatment Centers for the Sexually Abused (1978)
Trees for Life (1989)
Tuition Tax Credits (1982)*

Use by Mass News Media of Names of Juveniles in Police Matters (1971)
Use of Children as Subjects in Pornographic Materials (1977)

Violence and Vandalism (1980)
Violence in the Home (1977)
Violence Prevention in Schools (1999)
Voluntary Fingerprinting (1983)

Weapons on Campus (1973)

Youth Involvement (2004)

CAPTA POSITION STATEMENTS

<http://toolkit.capta.org/advocacy/position-statements/>

From time to time the California State PTA Board of Managers conducts studies of issues of general concern in light of the Purposes of the PTA and issues that affect the health, education and well-being of children and youth.

A study may result in formulation and adoption of a statement that establishes, clarifies or interprets a PTA position or belief. Position statements provide a basis for action on legislation and other California State PTA action.

Upon adoption, position statements, resolutions and general board positions are positions of California State PTA and remain in effect until they are amended, rescinded or retired.

No new statement, board resolution or general board position can be introduced that is in conflict with an existing position unless the respective corresponding position is first rescinded. The California State PTA Board of Managers may not amend or rescind a resolution and no board position may be in conflict with a resolution.

Statements are reviewed every five years to revise, review and deem relevant or to retire from current use. Statements that include quotes excerpted from state or federal law are reviewed annually. The dates under the title of each statement represent the date first adopted and the date of the latest revision/reaffirmation.

Accountability Systems: Statewide, Federal, and Local

Arts in Education

Assessment and Testing (Statewide)

Assistance to Families in Need

Basic Education

Before- and After-School Options for Children and Youth

Behavioral Health and Social Emotional Development

Character Education

Charter Schools

Child Abuse

Child Care

Child Victims/Witnesses Rights

Chronic Illness Care in California Schools

Commercialism in Schools

Comprehensive Community Schools with Integrated Services (Community Schools)

Credentialed School Personnel

Dangers of Energy/Caffeinated Drinks

Education of English Language Learners

Education: Higher Education

Education: Opposing Vouchers, Tuition Tax Credits and Deductions as Systems of Education Aid

Education: Parental Choice In Public Schools

Education: Support of Public Education

Education: The Early Years, Ages 3 to 6

Education: The Elementary Years, Ages 6 to 10

Education: The Middle Years, Ages 10 to 14

Education: The High School Years Ages 14 to 18

Energy Conservation

Environmental Health and Environmental Education

Equity for All Children and Youth

Evaluation of Teachers

Fair Housing

Family Engagement in Credentialing Programs

Family Planning

Family Responsibility and Accountability

Family Services

Firearms and Assault Weapons

Freedom to Learn

Funding of Mandated Programs: Effect on Public Education

Gang Awareness

Health Care Access for Children, Youth, Pregnant Women, and Their Families

Health Education

Homeless Children and Families

Inclusiveness and Diversity

Instructional Materials

Interpersonal Relations

Juvenile Offenders in the Justice System

Lead Poisoning

Library Services

Lottery Revenue and Public School Funding

Mass Media and the Family

Minor Consent for Health Care

Missing and Exploited Children

Nutrition and Physical Activity Education

Parent Involvement: Building Bridges and Eliminating Barriers
Parenting Education and Skills Development
Positive Youth Development
Prevention and Intervention Programs
Prevention of Teen Pregnancy
Public Involvement in School Governance
Public School Employer-Employee Negotiations

Reduced Class Size in Grades TK-3
Regulation of Medical Marijuana Providers Near Schools
Rights and Services for Undocumented Children and Children of Undocumented Immigrants
Rights of Foster Children and Foster Families

Safe Drinking Water in Schools
Safe School Environments
School Attendance
School Based Decision Making
School-Based/Linked Health Centers
School Bus Safety
School Closure
School Desegregation/Integration
School-To-Career Technical Education
Social Emotional Learning: Essential to a Well-rounded Education
Special Education
State Tax Reform
Status Offenders
Student Participation in Public Demonstrations
Student Records
Sugary-Sweetened Beverages

Teen Dating Violence Prevention
Television Programming
Toy Look-Alike Guns

Vaccinations

Year-Round Education
Youth Involvement
Zero to Three Years: A critical Period in Child's Development

APPENDIX

FROM NATIONAL PTA

- You are Your Child's Advocate
- Advocate With PTA
- Where Social Media and PTA Advocacy Collide
- How a Bill Becomes Law
- Corresponding with Your Members of Congress
- The Federal Budget and Appropriations Process

CALIFORNIA STATE PTA ADVOCACY RESOURCES

- California State PTA Advocacy Focus Areas
- Ed100
- Social Media & PTA Advocacy Chart
- California State PTA Legislation Platform
- California State PTA Legislation Policies and Procedures

BURBANK COUNCIL PTA

- Legislation & Advocacy News August 2019