

Taking Positions on Initiatives and Referenda

Guidance for Local Unit and Council PTAs

June 2004



A local unit PTA or a PTA council may take a stand on an issue, a legislative bill, initiative, or a referendum. The following information is provided to assist in this process.

Taking the Position

- A formal position regarding a ballot measure can be taken by either the board of directors or the general membership of a local unit PTA or PTA council.
- The issue can be included on the agenda as an “action item” at a regularly scheduled meeting or a special meeting. To fulfill legal requirements of notice, ten days notice of the meeting must be given to all members/board members.
- An approved facilities use form must be completed for the local unit or council meeting if the meeting is held on school property.
- Best practices would be to present both the “pro” and “con” positions of any issue to the body making the decision to support/oppose. For help finding supporting materials on ballot measures contact your Council or Region Legislation chair, WSPTA Legislative Director, or the WSPTA office (1.800.562.3804, Mary Kenfield, Government Relations.)

Communicating the Position

- Any communication which is persuasive in nature cannot be sent through school district property. This includes “kid mail” (flyers sent home with students), electronic methods which use district email/websites, or flyers posted/circulated on school property. To learn more about use of “kid mail” visit: <http://www.wastatepta.org/programs/Legislation/kidmail.htm>
- A PTA newsletter may contain a meeting summary which includes the position taken, **if** a meeting summary is customarily included in newsletters throughout the year.
- Units/Councils may send persuasive information to members regarding the position taken, and supporting materials via U.S. postal mail.

Frequently Asked Questions

Does a local unit need to take the same position as the Washington State PTA?

No, as individual 501 c-3 or c-4 organizations, each local unit and council has the ability to take their own position on this or any other public policy issue of importance. Each local unit PTA or Council PTA may be impacted differently by the issue, and therefore can make a determination based on what is best for their community.

Do the members need to vote on an issue?

While the board of directors can take a stand on an issue, they are accountable to the membership; therefore it is recommended that issues go to the members for a vote whenever possible. This can occur at a regular general meeting or a specially called general meeting.

How does a PTA call a special general meeting?

Ten days notice must be delivered to the members and the notice must include the agenda of the meeting.

What is the process for taking an issue to the members?

It is best to take the following steps:

- The board of directors includes the item on the agenda of its board meeting.
- A motion is made to present a recommendation to the membership with discussion and vote following.
- The item is placed on the agenda for the general meeting.
- During the meeting, a motion is presented on behalf of the board of directors specifying the recommendation.
- The motion is discussed and information is presented regarding the item. It is best practice to present information on both sides.
- The members vote on the motion.

What if the board of directors does not want to take a position?

The board of directors may place the item on the agenda of the general meeting as a “discussion” item. Information can be presented (again from both sides), and the members may discuss the item. If a member then makes a motion to support or oppose, the motion is handled like any other motion.

What position can a local unit take?

A local unit or council may support, oppose, or choose to take no position.

What if a member brings the issue up at a general meeting?

If a member makes a motion regarding an issue, the motion would be handled like any other motion. There would be a second, discussion, and vote.

What if a member brings a petition to a meeting?

If a member brings a petition to a meeting, the members can choose how to handle the petition:

- The President can ask if anyone objects to the petition. If there is a majority of members who object, the petition must be put away.
- The President can also ask if the members wish to discuss the issue. If so, the President can ask if they wish to do so at this meeting, or at a future meeting (in order to gather and present information.)

What if the board of directors takes a position without asking the members?

The board of directors is accountable to the membership. If a member objects to a position taken by the board of directors, they may request that the item be placed on the agenda for a general meeting.

What information can a local unit send home via kid mail?

There are very strict guidelines as to what can be sent home via kid mail. For more complete information please see <http://www.wastatepta.org/programs/Legislation/kidmail.htm>

- The principal has the final say regarding what can be included in kid mail.
- The agenda (which includes action discussion items on policy issues) can be sent out prior to the general meeting.

- Factual information that encourages civic duty may be sent to members (i.e. encouraging voter participation, etc.)
- Notice of the position taken by the PTA as part of a meeting summary may be sent to member, as long as this is standard practice for all meetings.

What can a local unit do after taking a position?

- A local unit may send out information regarding its position to members via U.S. postal mail or e-mail (provided it does not utilize school district email).
- A local unit may post information on its website **provided** that the site is not maintained by the school or district.
- A local unit may send out a press release.
- A local unit may contribute funds to a campaign (see below).
- A local unit may gather to lobby or campaign for an issue. Some examples include phone banking, sign waving, signature gathering, etc.

Can a PTA contribute funds to a campaign?

If the members wish to do so, a local unit or council may contribute monetarily to a campaign within the following guidelines.

- The funds may not constitute a substantial portion of the PTA budget – the general rule is that total yearly funds spent on lobbying activities may not exceed 5% of the total yearly PTA expenditures.
- There is a line item in the budget for such activities. Most units do have a small line item to cover donations to campaigns.
 - If a line item exists, the board of directors may vote to allocate funds from the budget.
 - If there are not enough funds in the line item, the board of directors may vote to reallocate funds according the standing rules of the local unit or council.
 - The general membership may vote at a general meeting to allocate funds to a campaign.
- If there is no line item in the budget, the members (at a general meeting) must vote to place the line item in the budget and allocate funds for that line item.

Resources & Links

Pubic Disclosure Commission – Interpretation of RCW 42.17.130, Regarding use of School Property: <http://www.pdc.wa.gov/guide/interpretations/pdf/PDCSCHOOLSFINAL.pdf>

Updated guidelines for use of “kid mail:”
<http://www.wastatepta.org/programs/Legislation/kidmail.htm>

PTA Advocacy and Election guidelines:
<http://www.wastatepta.org/programs/Legislation/ElectionGuidelines/guidelines.htm>

Statutory Limits On The Use of Public Funds/Facilities – Attorney General memorandum
<http://www.wastatepta.org/programs/Legislation/Miscellaneous/memorandumseptember13.htm>

For questions or concerns regarding this issue please contact the WSPTA office at 1.800.562.3804 or mkenfield@wastatepta.org.