

PTA has a long history in advocacy, and one of the frequent ways PTAs get involved in their communities is by endorsing and supporting ballot measures. Most often this will relate to school bonds or levies, but the same steps apply for any measure on a ballot.

As soon as you find out your school district is running a bond and/or levy, there are steps you should take to help educate and involve your membership. Councils have a special leadership role in educating their local PTA leaders.

Step	Action Item(s)
<b>District Meeting</b>	<p><b>COUNCILS</b></p> <p>As early in the process as possible, meet with school district leadership to learn about the content and timing of the ballot measure(s). Begin encouraging local PTAs to schedule membership meetings 2-3 months before the election.</p>
<b>Schedule Membership Meeting</b>	<p><b>COUNCILS &amp; LOCAL PTAs</b></p> <p>Schedule a membership meeting:</p> <ul style="list-style-type: none"> <li>• With proper legal notice as required by nonprofit law.</li> <li>• As soon as district will be ready to start community presentations.</li> <li>• <b>BEST PRACTICE</b> - While the board of directors may take a stand on an issue, they are accountable to the membership; therefore, it is best practice to have ballot measure decisions made by the members.</li> </ul>
<b>Hold Membership Meeting</b>	<p><b>COUNCILS &amp; LOCAL PTAs</b></p> <p>Hold membership meeting:</p> <ul style="list-style-type: none"> <li>• Educate membership on contents and timing of ballot measure(s) – present both pro and con and include applicable WSPTA or council positions. If both pro and con sides are not present, use statements from the printed or online voter’s pamphlet (Secretary of State’s website), or the website of the missing side.</li> <li>• Your PTA may take two votes (one to endorse and one to support) and can word the motions to fit your situation.</li> <li>• <b>Motion to Endorse Steps:</b> (1) Consider motion to endorse (endorse the group approves of the proposal and recommends people vote for it) – (2) get a second – (3) have discussion –(4) vote – (5) record the vote in minutes.             <ul style="list-style-type: none"> <li>○ <b>Sample Motion to Endorse</b> - “I move that the _____ PTA endorses a (“YES” or “NO”) vote on the _____ School District’s month, year, ballot/initiative name and number.”</li> </ul> </li> <li>• <b>Motion to Support Steps:</b> (1) Consider motion to support (support means the group wants to give time, money, and/or resources) – (2) get a second – (3) have discussion – (4) vote – (5) record the vote in minutes.             <ul style="list-style-type: none"> <li>○ Motions to support may or may not include a financial donation to the campaign.</li> <li>○ <b>Sample Motions to Support:</b> <ul style="list-style-type: none"> <li>▪ <b>With Donation with an Existing Budget Line</b> - “I move that _____ PTA supports the “Yes campaign name” and allocates funds to the “Bond &amp; Levy Campaign” budget line in the amount of \$XXX.” <b>OR</b> “I move that _____ PTA supports the “Yes campaign name” and reallocates funds from</li> </ul> </li> </ul> </li> </ul>

	<p>the “XXX” budget line to the “Bond &amp; Levy Campaign budget line in the amount of \$XXX.”</p> <ul style="list-style-type: none"> <li>▪ <b>With Donation <u>without</u> an Existing Budget Line</b> - “I move that _____ PTA supports the “Yes campaign name” and adds a budget line item called “Bond &amp; Levy Campaign” in the amount of \$XXX.”</li> <li>▪ <b>Without Financial Donation</b> – “I move that _____ PTA supports the “Bond &amp; Levy Campaign” with volunteer time/resources.</li> </ul>
<b>Announce Results</b>	<p><b>COUNCILS &amp; LOCAL PTAs</b> If your PTA votes to endorse and/or supports a bond/levy, you should announce it to your membership. You may use all PTA communication channels but be careful not to use district resources if you are attempting to persuade or influence how people vote.</p>
<b>Next Steps</b>	<p><b>MOTION PASSES:</b></p> <p><b>COUNCILS</b></p> <ul style="list-style-type: none"> <li>• Meet with campaign leadership to see how council can be involved. Opportunities include, but are not limited to: <ul style="list-style-type: none"> <li>○ Scheduling presentations at local PTA meetings.</li> <li>○ Recruiting volunteers to phone bank, doorbell, sign wave, distribute signs, etc.</li> <li>○ Providing endorsement quotes or letters to the editor.</li> </ul> </li> <li>• Begin regular communication with local PTAs about: <ul style="list-style-type: none"> <li>○ FAQs and resources about ballot measures and votes to endorse and support.</li> <li>○ Content and timing of ballot measure(s) – district information.</li> <li>○ Begin sharing information from the campaign.</li> <li>○ Communicate using all PTA methods (email, social media, meeting time, coffee chats, non-district websites and newsletters, etc.)</li> <li>○ Ask local PTAs to schedule a membership meeting 2-3 months before the election to educate their membership and consider motions.</li> <li>○ <b>Important</b> – When using school or district communication channels, you can only share factual information without attempting to persuade or influence.</li> </ul> </li> </ul> <p><b>LOCAL PTAs</b></p> <ul style="list-style-type: none"> <li>• Talk with council and the campaign about how your local PTA can get involved. If your PTA is not part of a council, you can reach out directly to the campaign. <ul style="list-style-type: none"> <li>○ Recruit volunteers to phone bank, doorbell, wave signs, use yard signs, etc.</li> <li>○ Provide endorsement quotes or letters to the editor.</li> </ul> </li> <li>• Begin regular communication with members about: <ul style="list-style-type: none"> <li>○ Content and timing of ballot measure(s) – district information.</li> <li>○ Begin sharing information from the campaign.</li> <li>○ Communicate using all PTA methods (email, social media, meeting time, coffee chats, non-district websites and newsletters, etc.)</li> <li>○ <b>Important</b> – When using school or district communication channels, you can only share factual information without attempting to persuade or influence.</li> </ul> </li> </ul> <p><b>MOTION FAILS:</b></p> <ul style="list-style-type: none"> <li>• Let meeting attendees know they can get involved in the campaign as individuals.</li> <li>• Share district information with your local PTAs or members about ballot measure(s) (informational only – nothing persuasive or from the campaign).</li> <li>• Share information about registering to vote.</li> <li>• Encourage people to vote (not how to vote).</li> <li>• Continue sharing this information through election day.</li> </ul>

## Frequently Asked Questions

### 1. Who can take a position on a ballot measure, such as school levy or bond, a legislative bill, initiative, or a referendum?

A local PTA or council may take a position, provided it does not conflict with adopted Washington State PTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA. A position can be taken by the board of directors or membership, but it is the best practice to have important ballot measure decisions made by the members.

### 2. What positions can a local PTA or council take?

A PTA may support, oppose, or choose to take no position.

### 3. Can a local PTA or council vote to endorse a candidate for public office?

No. The *WSPTA Uniform Bylaws* (Article II, paragraph B) prohibit both 501(c)3 and 501(c)4 PTAs from engaging in any activities in support of or in opposition to any candidate for public office (city/county council, school board, the Office of the Superintendent of Public Instruction, along with all other public offices). PTAs may not make contributions, publish, or distribute statements, or use PTA board or membership lists to support any candidate. Individual PTA leaders may endorse candidates personally but must not mention PTA in any endorsement, including on social media.

### 4. When can a vote take place?

The issue can be voted on at a regularly scheduled or special meeting with the following legal notice as required by nonprofit law:

- Regularly scheduled board or membership meetings = ten days' notice
- Special board meetings (notification to all board members of place, date, time, and purpose of the meeting) = five days' notice
- Special membership meetings (notification to all members of place, date, time, and purpose of the meeting) = ten days' notice

### 5. Can a vote take place at school?

A PTA can use school property if it has signed a facility use agreement with the school or district.

### 6. Can a local PTA or council contribute funds to a bond/levy or initiative/referendum campaign?

Yes, if the members vote to do so (see above process to vote to support). The PTA must have, or add, a member-approved budget line item for the donation to allow for the allocation or reallocation of funds. For information on lobbying limits, see question 11.

### 7. What communication methods can be used to announce the results of a vote and to share?

If using school district channels for communication, PTAs must comply with the same restrictions as the district. A PTA may not promote a bond/levy position on its district-sponsored website, school-sponsored newsletter, kid mail, school reader board, or at a school or district event. Only factual information can be shared using district resources.

PTAs may share persuasive information via all PTA communication channels, including email, social media, meeting time, coffee chats, non-district websites and newsletters, etc.

## 8. What if a member objects to a position taken by the board of directors?

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

## 9. What if a member brings up an issue at a membership 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.

## 10. What if a member brings a petition to a membership meeting?

The members choose how to handle it. The presiding officer can ask if anyone objects to the petition. If most members object, the petition must be put away. The presiding officer can ask if the members wish to discuss the petition. If so, they can ask if they wish to do so at this meeting, or at a future meeting (to allow time to gather and present information.)

## 11. Are there limits to how much lobbying a local PTA or council can do?

Lobbying activities by PTAs are **not prohibited** by law. However, the Internal Revenue Service (IRS) limits lobbying activities of all 501(c)(3) organizations to “an insubstantial part” of its activities. Under current law, there are two ways a PTA can meet the “insubstantial” test:

**No Section 501(h) election** - One way to meet the “insubstantial” requirement is to limit expenditures on lobbying activities to a small percentage of the organization’s overall expenditures – generally accepted to be no more than 5%.

**Section 501(h) election** - The second method is to make a Section 501(h) election by filling out and filing IRS Form 5768. This simple, single-page form must be filed prior to the end of the fiscal year (June 30) in which you wish to claim the election and allows a PTA to spend up to 20% of its first \$500,000 of its total exempt purpose expenditures in lobbying activities. Once filed, it does not need to be filed for future tax years. You can revoke it at any time for any reason using Form 5768, and it can be reinstated.

Because this “safe harbor” election provides PTAs with absolute certainty as to the amount that can be spent on lobbying activities, **WSPTA recommends that all 501(c)(3) PTAs make this election.**

## 12. What types of activities are considered lobbying?

- Advocating the adoption or rejection of specific legislation.
- Communicating with a legislator (or his or her staff) regarding specific legislation.
- Using the public to contact a legislator (or staff) with respect to specific legislation.
- Local PTA and council examples of lobbying activities/expenses: Legislative Assembly, Focus Day, legislative roundtables, candidate forums, bond/levy, and initiative/referendum campaigns.

## 13. What types of activities are not considered lobbying?

- Communication to members regarding pending legislation, if you are not asking your members to engage in grassroots lobbying.
- Responding to a legislator’s request for advice or assistance, even about pending legislation.
- Routine communications with legislators or government officials.

For additional help related to taking positions on ballot measures, contact your council or region advocacy chair, or the WSPTA advocacy director [PTAadvocacydir@wastatepta.org](mailto:PTAadvocacydir@wastatepta.org).