

<b>Legislative Purpose</b>	<b>2</b>
<b>Legislative/Advocacy Chair</b>	<b>2</b>
<b>Oregon PTA Legislative Procedures</b>	<b>3</b>
<b>Local Unit/Council Legislative Activity</b>	<b>3</b>
<b>Oregon PTA Legislative Platform and Positions</b>	<b>4</b>
<b>Oregon PTA Legislative Action Program</b>	<b>4</b>
<b>Grassroots Lobbying</b>	<b>4</b>
<b>Lobbying</b>	<b>4</b>
<b>What Not to Do</b>	<b>5</b>
Nonpartisan Policy	5
501(c)(3) Organizations	5
<b>What a Unit Can Do</b>	<b>6</b>
Support/Oppose Ballot Issues	6
Correct Use of PTA Title	6
School District Levy/Bond Issues	6
<b>Coalitions</b>	<b>6</b>
<b>PTA Members Holding Public Office</b>	<b>7</b>
<b>National PTA Action Alert and Oregon PTA Legislative Action “Engage”</b>	<b>7</b>
<b>How to Change Oregon &amp; National PTA Legislative Platforms &amp; Action Programs</b>	<b>7</b>
<b>Resolutions</b>	<b>8</b>
Resolution Criteria	8
Sample Resolution	9
Requirements for Submitting Resolutions	9
Procedure for Submitting Resolutions	10
Rejected Resolutions	10
Emergency Resolutions	10
<b>Taking Action on State &amp; Federal Issues</b>	<b>11</b>
<b>Calendar of Suggested Activities for Legislative Chairs/Committees</b>	<b>11</b>

## Legislative Purpose

To motivate and give direction to all levels of PTA for involvement in legislative action and to help each unit/council be involved in securing “adequate laws for the care and protection of children and youth.”

All Americans have an obligation to exercise the rights and duties of citizenship while receiving the benefits of living in our country. It is an ongoing obligation, requiring persistent study and action. Good citizenship requires active participation in the many cooperative projects that are dedicated to community betterment.

Training in citizenship begins in the home, where example, precedent, and participation in family activities are the teachers. The experiences gained in school broaden the concept of the objectives to be attained. Advancing to actual and active sharing with others in community and civic affairs brings realization and fulfillment to these objectives.

## Legislative/Advocacy Chair

Local units may elect or appoint a legislative/ advocacy chair or committee to serve as a liaison between the Oregon PTA's Vice President for Legislation and the local unit. The legislative chair may help represent the local unit at local events and represent the local unit at statewide events such as Salem lobby days and legislative visits. The Legislative Chair may also distribute information from the state to the members and present issues at general meetings. Advocacy chair would also be responsible for updating the local unit social media accounts with information regarding legislative issues facing their community.

There is no experience necessary, just a willingness to support and advocate for every child of Oregon.

Suggested areas of interest for the committee are: attending school board meetings, making contact with legislators, and inviting them to meetings. Also crucial to the success and education of the unit are public issue and candidate forums. The legislative chair may be asked to assist with local campaigns.

Please submit the chair's name if you have one to Oregon PTA via the officer's list.

## Oregon PTA Legislative Procedures

PTA has always recognized that an organization dedicated to the welfare of children must inevitably be concerned about laws that affect children. The Oregon PTA Legislative Platform together with the Oregon PTA Legislative Action Program are the declarations of our organization's stand on legislative issues in areas of concern to Oregon PTA. These documents are a direct result of local unit participation.

Any local unit or council may bring issues they believe are of concern to PTA by proposing a resolution or position statement to the Oregon PTA Vice President for Legislation and/or Oregon PTA Resolutions Committee. Proposals which meet the resolution criteria are voted on at the annual state conference and convention and, if they pass, become the property of the general membership. This is democratic participation in action!

Each local PTA/PTSA unit and council should appoint a legislative chair, or add these responsibilities to the job description of a current officer. Legislative information will be sent periodically to that chairperson/officer. In addition, "Legislative Chair Calendar" has been created to assist the legislative chairs.

A legislative summit is held every year during the long legislative session years. During the interim years of shorter sessions a rally/lobby day will be held. Each local unit should plan to send a delegate to these events.

Visits to Senators and Representatives are encouraged throughout the session. If you would like more information about visiting your representatives please contact the Oregon PTA Vice President for Legislation.

## Local Unit/Council Legislative Activity

Local PTA/PTSA unit and councils can initiate PTA legislation. Examples of ways to do this are listed below:

- Write and submit a RESOLUTION, to be considered by delegates at the Oregon PTA annual state conference and convention, and possibly forwarded for consideration at the National PTA convention.
- Write and submit proposed changes to the Oregon PTA Legislative Platform and Action

Program.

- Write and submit proposed “position statements” for adoption by delegates at the annual state conference and convention.
- Write and submit proposed changes to the National PTA Legislative Program.

For additional information on legislation, please contact the Oregon PTA Vice President for Legislation.

## Oregon PTA Legislative Platform and Positions

Please see the Advocacy section of the Oregon PTA website for the most current information on Advocacy including a copy of the Oregon PTA Legislative Platform, Resolutions passed by Oregon PTA, and the National PTA's Federal Policy Agenda. Oregon PTA Advocacy Link: <http://oregonpta.org/advocacy/>

## Oregon PTA Legislative Action Program

The Oregon PTA Legislative Activity guide is intended to be used in conjunction with the National PTA Annual Resources. The Legislative Platform and Action Program belong to every local unit and member. It serves as a reference and tool for advocacy for members, units, and children of the local school. Example: If XYZ PTA was having a traffic issue, and wanted change to correct the issue, the XYZ PTA could use Health & Welfare Policy #16 as support for advocacy and the resolution of the issue.

## Grassroots Lobbying

PTA's legislative activities are primarily considered grassroots lobbying because the efforts that members make are to educate the general public and elected or appointed officials on legislative matters at the executive, legislative, and judicial levels.

## Lobbying

Lobbying, as opposed to grassroots lobbying, is attempting to influence the passage or defeat of legislation by a legislative body (i.e., city, council, school board, state legislature) or the adoption or rejection of any rule or standard by a regulatory agency. Lobbying includes contacting

legislators or legislative staff about pending or proposed legislation, and attempting to influence the content of governmental agency rules and regulations through contacts with government employees on behalf of PTA. There are some limitations placed on PTA and its involvement in legislative activities. These limitations are: The association's nonpartisan policy; and IRS limitations on 501(c)(3) organizations.

## What Not to Do

### Nonpartisan Policy

The nonpartisan policy exists for a very important reason. PTA must be responsive to the requirements of federal law if it is to retain its tax exempt status. Federal law provides a very important limitation on PTA activities. PTA units/councils may not "participate in or intervene in any political campaign on behalf of any candidate for public office." Oregon PTA Unified Bylaws state that PTA shall be nonpartisan. This means that there shall be no connection with any political party or candidate for public office. Political action is an integral part of PTA's activities; for without political action, democratic laws would not exist. Adherence to the nonpartisan policy does not require that PTA refrain from or ignore political action, nor does it prevent PTA from carrying on efforts concerned with legislative issues or official actions that threaten the well being of children and youth.

### 501(c)(3) Organizations

The Internal Revenue Service severely limits the ability of charitable organizations (those tax-exempt under section 501(c)(3)) to engage in legislative activity. IRS regulations state that a charitable organization may not devote more than an insubstantial part of its activities/efforts to affecting legislation. In the event of an IRS audit, PTAs exempt under section 501(c)(3) would be required to show how much of their activities (both in funds and in member hours) were expended on legislative activities. All PTAs exempt under this section should maintain records indicating:

- Members' volunteer hours spent on legislative activities, including the name of the member(s), type(s) of activities, and date(s).
- Amount of PTA funds spent on legislative activities.

## What a Unit Can Do

### Support/Oppose Ballot Issues

PTA can take an active position – after a vote by the general membership to take such a position – in support or opposition to any legislative issue (including levy and bond issues). An active position can include promoting the position in the PTA's newsletter, distributing press/news releases, making presentations to civic/community groups, purchasing media advertising, printing banners, flyers, bulletins, handouts, etc. – conditioned upon the limitations outlined in this booklet for nonprofit, tax-exempt organizations and limitations imposed by the unit's membership.

### Correct Use of PTA Title

PTA officers may use their PTA title when publicly supporting or opposing ballot measures only if/when the general membership of the local unit, state, or National PTA has voted to endorse/oppose said measure. PTA officers may never use their titles when supporting or opposing candidates. In the event of a local election in a community where a PTA officer is so closely linked with PTA that community members will associate that officer with PTA regardless of his/her use of title, that officers must refrain from publicly supporting or opposing any candidate.

### School District Levy/Bond Issues

PTAs often contribute both funds and volunteer support to school district levy and/or bond issues. This is considered “attempting to influence legislation.”

## Coalitions

The reputation and credibility of PTA is determined, in great part, by the groups and organizations with which it works. PTA must always exercise “due diligence” in selecting organizations with which to support, endorse, or work. “Due diligence” means assuring that the organization's purposes, goals, and specific objectives are consistent with the policies, principles, and ethics of PTA.

It is very important, when requested to donate support, funds, and/or volunteer resources to a group, that you take time to investigate what type of group it is.

- Is the group a PAC (political action committee),

- coalition, or another non-profit?
- What is their IRS status? Is the group registered with the Secretary of State, Department of Justice, or county election office?
- What is the make-up of the organization/ committee (i.e., membership, contributing organizations)?
- Do you have a voice in the direction the group is taking and the activities it is planning?

## PTA Members Holding Public Office

An officer or director of PTA is not prohibited or prevented from running for or holding a public office. To ensure the nonpartisan requirements placed on PTA, the PTA member must, when campaigning for office or serving in the office, sever his/her identity with PTA as it relates to that public office.

## National PTA Action Alert and Oregon PTA Legislative Action “Engage”

All local unit and council legislative chairs and any other interested party are kept up-to-date on legislation being considered on the state and national levels via email alerts. They are then asked to send the alerts to their own local list.

The alerts may be informational only, or they may request a specific action; which would be to email, telephone, or fax the recipient's state or federal senators and/or representatives on an issue of importance to our children. This enables Oregon PTA and National PTA to maintain a high profile on these issues, and to be taken seriously in the legislative arena.

## How to Change Oregon & National PTA Legislative Platforms & Action Programs

Any local PTA/PTSA unit or council may bring matters believed to require legislative action to the attention of Oregon PTA by writing to the Oregon PTA Vice President for Legislation.

- Requests should be signed by the president of the submitting unit.
- Background information and rationale are to be submitted with all proposals.
- Suggested policy statements must concern the well-being of children and youth, be

statewide in scope, and be in accord with the Oregon PTA objectives.

- All suggestions for changes must be in writing and received at the Oregon PTA office by December 31st of each year.

All letters about legislation and all proposed changes – additions as well as deletions - in the legislative platform are referred to the Legislative Committee. The Committee then recommends to the Oregon PTA Board of Directors the proposal, for approval, before presentation to the annual state conference and convention. If a favorable vote is received from the convention body, it becomes part of the Legislative Program of Oregon PTA. Although a local PTA/PTSA unit or council may decide not to give active support to an item that has been adopted, it is expected that it will refrain from active opposition.

A local PTA/PTSA unit may also initiate changes in the National PTA Legislative Platform. The same procedure is used as with initiating changes in the Oregon programs. However, upon final approval by the convention body, the item would then be forwarded to National PTA for their consideration.

## Resolutions

New activity for Oregon PTA and its constituent bodies (regions, councils, and local PTA/PTSA units) begins at a state convention with the passage of a STATE RESOLUTION. State resolutions are a call for action regarding problems, situations, or concerns that affect children and youth statewide. Local PTA/PTSA units and councils are encouraged to express statewide concerns through the resolution process.

### Resolution Criteria

A resolution is a motion that, because of its importance, is submitted in writing. At the annual state conference and convention, new business is introduced through a resolution.

**A resolution usually consists of two main parts:**

---

- A preamble – the whereas clause(s);
- A request for action – the “resolved” clause(s).

The “whereas” clauses contain the background information and the reasons for the resolution. The “resolved” clauses contain requests for action. Each action requested should have its own

“resolved” clause. Following is a sample resolution, showing the correct structure, punctuation, and form. For additional information and help, refer to Roberts Rules of Order.

### Sample Resolution

Whereas, That portion of a resolution comprising the phrases starting with word “Whereas” is known as the preamble of the resolution: and

Whereas, The preamble includes statements of factor background relating to reasons for the action proposed in the “Resolved” clauses or information that is not common knowledge or that may be overlooked if not stated; and

Whereas, The action taken on a resolution is action only on the motion in the “resolved” clauses; now therefore be it

Resolved, That any resolutions being proposed for consideration at the annual state conference and convention be submitted to the Oregon PTA office no later than December 21, 20XX; and be it further

Resolved, That it be directed that resolutions submitted to Oregon PTA for consideration shall follow this sample resolution in structure, punctuation, and form; and be it further

Resolved, That such resolutions meeting all established requirements and procedures be presented to convention delegates for consideration at said convention.

### Requirements for Submitting Resolutions

To be appropriate for consideration by the Oregon PTA Annual State Conference and Convention Resolutions Committee, a resolution shall:

- Concern a field of interest of Oregon PTA;
- Be in harmony with the Objects and basic policies of National PTA;
- Concern a matter which is statewide in scope and requires statewide action for solution;
- Be written in appropriate resolution form (i.e., “Be it resolved that Oregon PTA shall....”);
- Be accompanied by background material and a brief narrative summary of that material;
- State a position not previously adopted by Oregon PTA; and

- Be submitted to the Oregon PTA Office by December 31st.

An example of documentation would be evidence of substantive compiled research. Reprints of newspaper editorials and articles are not necessarily adequate documentation. The background material should be sufficient to give a person with no previous knowledge of the subject enough information to make an intelligent decision.

### Procedure for Submitting Resolutions

- Resolutions shall originate only from local PTA/PTSA units, councils, Oregon PTA Board of Directors or Executive Committee. In each case, the Resolutions shall be signed by the president and secretary of the submitting group.
- Resolutions from local PTA/PTSA units and councils shall be forwarded to Oregon PTA by December 31st.
- All resolutions will be forwarded to the Oregon PTA Resolutions Committee. After study, the committee will submit all resolutions to the Executive Committee, and it will submit to the Board of Directors only those resolutions it considers pertinent and within the scope of National PTA Policies and Oregon PTA Policies and Program. With the approval of the Board of Directors, the Resolutions Committee will submit to the convention delegates all resolutions recommended for consideration.

### Rejected Resolutions

In the event that a resolution submitted to the committees is not recommended by the Board of Directors for annual state conference and convention action:

- The Oregon PTA Resolutions Committee shall notify by March 1st, the group which submitted said resolution, of the action and reasons for rejection.
- A rejected resolution may be brought to the annual state conference and convention floor with a two-thirds (2/3) affirmative vote of the conference and convention delegates to consider the resolution, providing notice of such intention to submit this resolution has been presented to Oregon PTA no later than March 15th.

### Emergency Resolutions

The following provision is made for submitting an emergency resolution:

- The urgency of the subject matter shall have arisen after the deadline for submission of a resolution.
- Emergency resolutions shall conform to all established criteria for other resolutions.
- The Resolutions Committee shall meet prior to the opening of the annual state

conference and convention, and thereafter as necessary, to consider emergency resolutions.

- Six copies of the emergency resolution must be submitted to the state president prior to the opening of the first general session.
- Sufficient copies for the entire delegation must be furnished by the end of the first general session by the delegate presenting the resolution.
- A two-thirds (2/3) affirmative vote of the delegate body is necessary before an emergency resolution shall be considered.

## Taking Action on State & Federal Issues

The power of our association is the ability to work locally as well as on a statewide and national level on issues affecting the health, welfare, and education of children. While you work and advocate on the local level, members of the Oregon PTA are working for our members interests at the state and national level.

On occasion, it is important for you to help us make our point. Oregon PTA makes it easy for member to stay in touch with Engage. Encourage members to sign up for National PTA legislative alert

## Calendar of Suggested Activities for Legislative Chairs/Committees

### May-August

---

- Attend officer training and study materials received from previous chair.
- Be sure your name is on file as the legislative chair at the Oregon PTA office and contact the VP for Legislation to make sure you are on any "Lists" to keep informed about state and national issues.
- Become informed about local issues, school board members, and legislative representatives.
- Call Oregon PTA VP of Legislation to introduce yourself and let them know areas of interest and get a quick update.
- Read Legislative section of onevoice
- Subscribe to National PTA Action Alerts and Oregon PTA Engage.

### September

---

- Request time for legislative issues on monthly PTA meeting agendas.
- Organize voter registration tables at Open House/other opportunities.
- Survey your members for responses to issues.
- Include legislative activities in the school or local unit newsletters.
- Register for Oregon PTA Action Alerts.
- Introduce yourself to your district superintendent.

### October

---

- Elections are in November. Remind members to vote, even if by absentee ballot.
- Formulate "Resolutions."
- Update local unit on Oregon PTA positions on state or county ballot measures.

### November

---

- Keep informed about local issues.
- Write letters to your legislators. Introduce yourself and the PTA's legislative priorities.
- Write a thank you note to your legislators afterward.
- Write an editorial for your local newspaper.

### December

---

- Develop a telephone tree or local email list.
- Publish legislators' phone numbers and email addresses in January newsletter.
- Submit Legislative Resolutions to the Oregon PTA Office.
- Invite your state senator or representative to a PTA meeting or a coffee.

### January

---

- Update information on the Legislative session.
- Write letters to your legislators and encourage your unit/council members to also do so.
- Read onevoice for updates on the coming legislative session and report to your local

unit.

### February

---

- Write a legislative article for the newsletter.
- Visit [www.leg.state.or.us](http://www.leg.state.or.us) for bill updates.
- Write letters and inform your membership of bills to support or oppose.
- Confirm date/time with your legislators for capitol visits.
- Register for the Oregon PTA Legislative Summit and state annual conference and convention.
- Check Oregonlive bill tracker for updates on priority legislation at <http://gov.oregonlive.com/>.

### March

---

- Continue phone, email, and social networking activities to promote legislative priorities.
- Submit legislation articles for newsletter on bills' status.
- Maintain contact with Oregon PTA Vice President for Legislation.
- Register for Oregon PTA Legislative Summit and annual convention.

### April

---

- Write your final report for the legislation notebook to be handed on to next year's chair.
- Continue phone tree, hot line, and letter writing activities.
- Attend Oregon PTA Legislative Summit and annual state conference and convention.
- Host a forum for school board or legislative candidates.
- Update PTA unit about the budget status for your school district.

### May-June

---

- Pass on notebooks and manuals.
- Send name of new legislative chair to the Oregon PTA Office.
- Keep yourself informed on current bill status.
- Send thank you notes to everyone who has helped you.
- Update local unit of any changes to policy platform or approved resolutions made at

Oregon PTA's annual conference and convention.

- Vote in May election.
- Collapse! Enjoy a short summer!