



NEW YORK STATE PTA®

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Gracemarie Rozea, President

Vision Statement

Making every child's potential a reality by establishing the New York State Congress of Parents and Teachers, Inc. (NYS PTA) as the premier association for parent involvement and advocacy for all children.

Mission & Values

PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and wellbeing of every child.

PTA Values

Collaboration: We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.

Commitment: We are dedicated to promoting children's health, well-being and education success through strong parent, family and community involvement.

Accountability: We acknowledge our obligations. We deliver on our promises.

Respect: We value our colleagues and ourselves. We expect the same high quality of effort and thought from ourselves as we do from others.

Inclusivity: We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.

Integrity: We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

NEW YORK STATE PTA ADVOCACY TEAM

Vice President

Advocacy Team Designated Officer

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LOBBYING AND POLITICAL CAMPAIGN ACTIVITY GUIDELINES

LOBBYING

Charitable and education organizations 501(c)(3)s such as PTAs face some restrictions regarding their lobbying activities. PTAs also must refrain from violating PTA policies of nonpartisanship. A 501(c)(3) organization which makes a 501(h) election can expend between 5% and 20% of its total annual program expenditures according to a formula. Restrictions on grassroots lobbying (i.e., efforts to inform we the public) are more severe. If a PTA does not file an IRS form to make the Section 501(h) election, it may expend an “insubstantial amount” on lobbying activities, generally understood as no more than 5% of the organization’s total annual program expenditures.

The following are some sample PTA activities, which may be used as general guidelines in determining what constitutes lobbying efforts:

Not considered lobbying efforts:

1. Informing members of legislative issues and positions critical to the goals of the association.
2. Researching and conducting nonpartisan analysis on legislation, stating the facts fully, stating your association’s position and allowing people to draw their own conclusion.
3. Inviting representatives or staff to visit or learn about your association’s program (not including discussions of specific legislation).
4. Explaining to members how a piece of legislation would affect your concerns.
5. Attending workshops on how to lobby.
6. Responding to official requests by legislative bodies for information or for testimony on the association’s position.
7. Conducting a neutral Candidates’ Night.
8. Endorsing or opposing the school budget.

Considered lobbying efforts, and must be counted for lobbying expenditures.

1. Informing people outside the membership of your position and encouraging them to write supporting your position on legislation or proposed legislation.
2. Telling people, your members included, to write or call supporting your position on legislation or proposed legislation.
3. Testifying about a position before a legislative body when you have not been specifically invited to appear.
4. Writing a “letter to the editor” which seeks to sway the community outside the PTA membership to a position.
5. Making a trip to the state or national capitol specifically to change a legislator’s mind about an issue.
6. Advertising in any media in an attempt to sway the general public to action supporting the PTA position on legislation or proposed legislation.

POLITICAL CAMPAIGNS

501(c)(3)s, such as PTAs, are absolutely prohibited from participating or intervening in political campaigns on behalf of or in opposition to any candidate for political office.

Any violation of the political campaign guidelines may result in revocation of tax-exempt status and loss of deductible contributions. Moreover, the IRS will consider complaints from the public that an educational organization is engaged in impermissible political campaign activity. During an election year, questions about IRS political restrictions for not-for-profits increase tremendously.

PTA officers, employees and volunteers may choose to participate on their own in the political process. If so, the following rules should be observed:

- An officer, employee or volunteer of the PTA, acting solely in his or her individual capacity, may participate freely in the political process.
- However, in one’s official capacity as an officer, employee or volunteer of the PTA, an individual may not:
 1. Make speeches for a political organization of a candidate or publicly endorse a candidate for public office.
 2. Submit funds for or pay an assessment, or make a contribution to a political organization or candidate for public office.

ENDORSEMENTS – PROHIBITED

PTAs may not make statements (oral or written) supporting or opposing any candidate for public office. They may not encourage votes for or against any candidate for public office, via a speech, PTA bulletin, editorial position or other media. PTAs should avoid statements that indirectly support or oppose a particular candidate, such as labeling a candidate as pro-education or anti-teacher. PTAs should not host partisan political events.

FINANCIAL AND OTHER SUPPORT – PROHIBITED

A PTA may not provide financial support to any candidate, political action committee (PAC) or political party. In addition, it may not provide other forms of campaign support, such as free volunteers, facilities or mailing lists to any candidate. It may not use PTA letterhead to solicit contributions.

POLITICAL ACTIONS COMMITTEES – PROHIBITED

A PAC is a political committee whose purpose is to influence the election of any individual to public office. Generally, a 501(c)(3) may not establish or support (financially or otherwise) a PAC.

PENALTIES

Because the political campaign activity prohibition is absolute, PTA organizations must take the prohibition on political activity seriously. Any violation of the restriction may result in revocation of exempt status and consequent loss of deductible contributions. There are additional financial penalties which may be imposed on both the association and on association managers. The financial penalties on managers can be as high as \$10,000.

GOVERNOR’S OFFICE

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To find your Senator:
www.nysenate.gov
Click “Find My Senator” or “Senators & Committees”

TO CHECK THE STATUS OF A BILL:
NYS ASSEMBLY:
assembly.state.ny.us/leg/
NYS SENATE
www.nysenate.gov/legislation

To find your Assemblymember:
assembly.state.ny.us
Click on “Assembly Members”, then use the drop-down menu or click “Search by Address”



Check out VoterVoice, our new advocacy communication system:
www.votervoice.net/NYPTA/Home