



Voluntary Dues Contribution Q. and A.

You said the \$60 would go away after three years. Isn't this just another way to keep that money?

No, not at all. The \$60 special assessment will go away whether State Council votes for this voluntary measure or not. In an effort to continue successfully fighting attacks on educators, students and school funding, as well as to create a CTA Foundation to provide more scholarships to members and support teachers' ideas to improve public education and help struggling schools, CTA is proposing a **voluntary** dues contribution. State Council is simply voting on whether to let CTA members decide if they want to contribute.

What do you mean by voluntary contribution or reverse checkoff? How will that work?

If approved by State Council, CTA members would decide if they want to contribute the suggested \$20. If they don't want to contribute, they will ask for and receive a full refund. Information about the reverse dues contribution would be given to members at the beginning CTA's fiscal year. If they don't want to donate, they will opt-out of the program and will receive a full refund. The reverse checkoff was designed to make it simple for chapter leaders and members.

How will this reverse dues process work?

The default allocation for the voluntary contribution checkoff will be set by State Council upon recommendation of the CTA Board of Directors each year and will follow the same process and timelines of developing the CTA Budget. All members will be enrolled in the default allocation option established by Council, but can choose to request a full refund, partial refund or allocate all of the money to one category. Members will be able opt-out of the program or adjust their allocation through a very simple form that will also be available on the members-only website. Members would have from July through November to decide if they wanted to opt out and get a refund. They will not have to repeat the process each year.

Call it what you want, but is this a dues increase?

No, this is not an automatic dues increase. It is voluntary. No member has to pay the proposed \$20 contribution. Through a reverse checkoff, members will decide if they want to contribute or not.

If State Council members vote for this, aren't they voting for yet another dues increase for CTA members?

No. State Council is simply voting to allow our members to decide if they want to contribute. The State Council vote will not increase any member's dues.

How will the money be spent?

The CTA Board is recommending to State Council that for 2008-09 the \$20 contribution be split evenly between CTA advocacy efforts and the new CTA Foundation. The money for advocacy would be spent to promote policies to improve public education such as additional school funding, smaller class sizes and affordable college for all students. It would also be used to fight attacks on public schools, such as the proposed state budget cuts, No Child Left Behind, school vouchers and attempts to decrease educator pensions. The Foundation would allow CTA to give more scholarships to CTA members and their families and will help CTA to forward the goals of the Institute for Teaching and ensure that teachers have a decision-making role in efforts to improve public schools. However, CTA members will have several options in deciding how to contribute.

Can I decide how my money is allocated?

Yes. Every member will be given the choice to decide how to allocate their contribution. They can choose to donate the suggested amount of \$10 for advocacy and \$10 for to the CTA Foundation. They can choose to give the entire amount to one area. They can choose to get a partial refund and give \$10 to only one category. Or, they can make no contribution at all. The choice belongs to every member.

What if I don't want to contribute at all?

You don't have to. The \$20 contribution is voluntary. No CTA member will be required to contribute. If you do not want to contribute, you do not have to. Members will be able to opt-out of the program and get a full refund. State Council's vote would simply let each member decide if they want to contribute.

Do CTA members support such a contribution program?

Yes. According to CTA research, CTA members overwhelmingly support the idea of a voluntary dues contribution to support these efforts. If given the opportunity, 72 percent of CTA members said they would choose to contribute.

What will CTA be able to do with the \$20?

CTA will have more tools and resources to effectively advocate for its members by fighting off harmful funding cuts to public education and erasing the punitive provisions of NCLB, as well as create a CTA Foundation to promote teacher-driven change in education and increase the number of scholarships available to CTA members and their dependents.

The money will allow CTA to establish a reserve fund that can be used when unexpected issues like a state budget crisis or federal legislation to implement a merit pay system occur. When we don't have the resources to fund unbudgeted campaigns, we occasionally need to borrow money. For example, our interest payments for Campaign 2005 amounted to over \$1.6 million.

In addition, creating the Foundation will allow CTA to bring in outside resources and accept contributions from other foundations to support the Institute for Teaching.

Don't my dues already pay for this kind of advocacy efforts?

CTA has a proud record of advocating for educators, students and public education. In 2005, thanks to the special assessment and the courageous action by State Council, we were able to defeat all of the Governor's harmful initiatives. But often our work is limited by the resources that are available. For example when Congressman George Miller proposed linking teacher pay to student test scores as part of reauthorizing NCLB, CTA had to scramble to find money to run the campaign to protect our members and the profession. We could not use Initiative Fund dollars because this campaign was not directly related to a statewide initiative. In addition, TV and radio advertising is very expensive in California and the costs keep going up. The \$20 voluntary contribution would allow CTA to create a rainy day fund in order to respond immediately and effectively to major issues and attacks on public schools.

How does creating a CTA Foundation help CTA?

First and foremost it will allow CTA to bring in outside resources to support CTA programs and to accept contributions from other foundations and organizations. It will help CTA attract outside donors to the Institute for Teaching by having matching funds to offer. In addition, combining all of the scholarship and grant programs into one foundation will also significantly reduce administration costs.

What scholarships will be supported by the CTA Foundation?

All of the various CTA scholarship and grant programs will be supported by the new foundation. It will allow CTA to give more scholarships to members, while alleviating the pressure to continually raise funds at State Council and other conferences. Creating the foundation will also help reduce overhead costs for administering the scholarship programs. The CTA scholarship and grant programs included are:

- CTA Scholarships for Members
- CTA Scholarships for Dependent Children (*This includes the Ralph Flynn scholarship and the Del A. Weber scholarship for a continuation or alternative high school student.*)
- L. Gordon Bittle Memorial Scholarship for Student CTA
- CTA Cesar E. Chavez Memorial Education Awards Program
- Martin Luther King Jr. Memorial Scholarships
- GLBT Safety in Schools Grant and Scholarship Program
- CTA Disaster Relief Program

Don't members already give to these scholarships? Will they be able to continue to give more?

Yes, some members choose to give to these programs now, and members can certainly always choose to give more to any scholarship fund. Creating the foundation will also allow CTA to bring in outside resources and accept donations from other foundations and donors.

Some members already have an automatic dues deduction to support these scholarship programs. Will they be able to get that money back?

Members can change their contributions to these programs at any time and could certainly choose to adjust their allocation amounts.

How much money will this raise for scholarship programs?

Even if CTA got \$1 from every member, this would more than double the amount of money currently going toward our scholarship programs and allow us to increase the number of scholarships given each year or the amount of each scholarship.

What is the CTA Institute for Teaching?

The Institute for Teaching is a CTA non-profit organization that has served various purposes over the years, but was resurrected five years ago to ensure that teachers have a decision-making role in efforts to improve public schools. It's designed to create better teaching and learning conditions in all California schools and to create teacher-driven solutions to help struggling schools. Through various grants, the IFT took on the issues of assisting our schools of greatest need, finding innovating solutions to help struggling high schools and promoting universal preschool. The High School Outreach Project targeted seven schools throughout the state. The IFT is also working on closing achievement gaps and reducing the number of high school dropouts. You can find additional information on www.teacherdrivenchange.org

Why is there so much flexibility for members to decide where the money goes? Members should know exactly where their dues money is going.

Members would be able to easily see where their contributions went each year and, in fact, they would decide what areas to support. Each year CTA will provide a detailed accounting of how the money is spent. Members will be able to see how much money was raised and where it was spent. In addition, CTA members also told us that they want CTA to have some flexibility in deciding what programs need the most attention that particular year.

Is this \$20 contribution tax deductible?

The money that goes to the foundation to support the Institute for Teaching and the scholarship programs will be tax deductible. CTA will notify members of their tax deductible donation each year.

CTA dues are scheduled to increase \$18 this year already. How can we ask members for more?

This contribution is voluntary. The proposal before State Council is to simply allow members to decide if they want to contribute. Our members will make the final decision. But even with the proposed \$20 voluntary contribution, members will still see a reduction in their annual dues as the \$60 dues assessment from 2005 expires.

Will this money be separate from CTA dues?

Yes, since this is a voluntary contribution, it will be tracked separately from regular CTA dues.

How does it impact member taxes?

It will be factored into member taxes like regular dues, but portions of it will also be tax deductible as a charitable contribution.

Similar to the ABC distribution, does this money go back into the general fund if someone decides not to participate?

No. This is not an automatic dues increase. Each member decides if they want to contribute. If a member decides not to contribute, they get their money back.

Will school districts have to do extra accounting work in order for CTA to get this money?

No. It will be implemented through existing accounting procedures for dues collection and CTA contributions. Many members already have checkoffs for scholarship funds. There will be no inconvenience or difficulties for districts, nor will districts have any control over the funds.

How will people get information about the voluntary contribution and their contribution options?

Information about the voluntary contribution will be available to members in several different formats. Information will be in the *California Educator*, on the CTA website and in membership materials and forms. For those who want to use the members-only website, they can easily opt-out of the program or change their contribution amounts and distribution. The information will also be on all CTA membership forms.

What is the timeline and when will members get their money back if they choose not to contribute?

Some of these details will be finalized if State Council approves letting members decide to participate in the program. But CTA is looking at a very flexible time period. Members would have from July through November to decide if they wanted to opt out. Once they made that decision, they would immediately get the full \$20 refund.

Will this be part of the Agency Fee calculation?

No. It is voluntary and therefore not part of Agency Fee calculations.

Why a reverse checkoff? Why not simply ask people to give?

Reverse checkoffs are very common and long-held practices in many state and local unions. In this particular project CTA research showed that a majority of members did not want to be bothered with a cumbersome process. They support the advocacy efforts and scholarship programs of CTA and want a very simple way to give. The process is also responsive to requests by chapter presidents that it be as easy as possible for the local chapter. This will be the most efficient and effective way to raise additional resources to advocate for members without a forced dues increase.

If a member does not want to contribute, will they have to opt out every year?

No. Members will fill out the opt-out form once. They will not have to opt out or fill out a form every year.

Won't this create another level of administrative costs for CTA?

Administrative costs will be minimal and handled as part of current dues collection. In addition, creating a single foundation to handle all of the scholarship programs will actually reduce administrative costs and save CTA money.

Isn't CTA just creating a "slush fund" for CTA pet projects without any accountability to members?

No. The money can only be spent according to the terms of the contribution program, which is established by the CTA Board and State Council, and as determined by members themselves. The distribution breakout between Advocacy and the CTA Foundation will be determined by State Council each year. In addition, each year, CTA will provide a detailed accounting of how the money was spent.

Does the reverse-contribution checkoff apply to all members?

It applies to all active members. Agency Fee Payers, CTA-NEA Retired and Student CTA members would not be part of the checkoff process.

Does this mean no more fundraising tables at CTA conferences?

Yes, that is certainly the goal. Rather than raising money, scholarship committees could use the conferences to promote the programs to CTA members.

How much money will the reverse contribution effort raise?

Based on the experiences of other states, we can expect about 95 percent of members to contribute, which would raise around \$6 million a year.

How will the voluntary contribution impact contributions to the NEA Fund for Children?

It will have no direct impact at all. By law, the NEA Fund for Children must rely on voluntary contributions. However, indirectly, clearing away the clutter of so many fundraising tables at CTA conferences would certainly make it easier to target fundraising for the NEA Fund.

Could this fund help CTA save money in the long run?

Yes. When CTA doesn't have the resources to fund unbudgeted or unexpected campaigns, we occasionally need to borrow money. For example, our interest payments for Campaign 2005 amounted to over \$1.6 million. Also, combining all of the scholarship and grant programs into one foundation will reduce administrative costs.

How do we know this money will be spent correctly?

Each year CTA will provide a detailed accounting of how the money is spent. Members will be able to see how much money was raised and where it was spent.