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## **District/SIG PAC Fundraiser Guidelines – Ethics/Law Course**

**What:** CAL-PT-PAC Sponsored Ethics/Law Course

**Why:** The purpose of the CAL-PT-PAC Sponsored Ethics/Law Course is to solicit political donations from members and non-members to support legislators that share an interest in the issues confronting the profession and the association, perspectives of what the association should be doing, and perspectives of how we can improve our effectiveness in the political environment. It will be a formal presentation by a member of the CPTA Ethics Professionalism Council or Quality Practice Committee. The host DIS/SIG and will determine the event format. The preference would be to have a member of the Professionalism Council or Quality Practice Committee to highlight many of the current Ethical and Legal issues facing our profession.

No more than “Four” courses, in coordination with CPTA Districts and Special Interest Groups will be offered annually. Based on the approved CAL-PT-PAC budget, the exact number and location(s) will then be determined.

Once a District/SIG has agreed to host an event, it is the DIS/SIG responsibility to notify CPTA Staff of a date range and final location. CPTA Staff will confirm an event date once speaker availability is verified. The goal should be to select a date that fits well into the District’s master calendar as well as making sure that it does not conflict with or fall close to other significant CPTA meetings. Although a CAL-PT-PAC Ethics Course may substitute for a District meeting, the meeting does not need to supplant a regularly scheduled District meeting; however, attendance by both members and prospective members is desired.

A Trustee of the CAL-PT-PAC will be assigned to attend the event and be available to assist with onsite logistics. Depending on the format of the Course the District/SIG may want to consider having several members of the host district’s executive committee in attendance. Either the host DIS/SIG chairperson or the CAL-PT-PAC liaison can act as moderator. The CAL-PT-PAC Trustee will open the meeting and briefly thank the host, current donors and attendees while highlighting the role of the CAL-PT-PAC and importance of financial capital and advocacy for our profession.

**Timeline:**

1. All meeting dates should be made as early in the year as possible. As some districts plan their entire year before the end of January, the CAL-PT-PAC may need to receive requests more than a year in advance.
2. It is the responsibility of the host District/SIG Chairperson (or other District representative) to find a suitable meeting space.
3. Once the meeting date and location has been established, notification and promotion of the event to all members and prospective members should be immediate and ongoing. Discussion points, such as current professional and legislative issues, should be touted on all promotional material.
  - The District/SIG should promote the meeting as they would any other meeting, including announcement at all prior meetings, District/SIG sponsored continuing education courses and via the District/SIG newsletter.
  - The CPTA’s electronic media will also be used, including CPTA Education Notes and website.

- CPTA will complete the CEU application process and send a copy to the District/SIG Executive Committee within 7 Business days. In addition, CPTA will communicate the application decision, in writing to the District/SIG Executive Committee within 14 business days. CEU course evaluations and certificates of course completion must be distributed by the District/SIG Executive Committee. CPTA's CEU Summary of Evaluations must be received in the CPTA Executive Office within 60 calendar days from course completion.
4. The host District/SIG Chairperson (or other District representative), with assistance if needed from the CAL-PT-PAC liaison or designated CPTA Management Team member, will be responsible for scheduling the speakers. Consideration should be given to the "current" professional issues likely to be discussed; assuring that each can be adequately addressed by one of the guest speakers.

**Costs:** Costs associated with the meeting space and/or refreshments, CEU Application Fees, and additional miscellaneous costs will be covered by the DIS/SIG. Travel and/or lodging costs, if needed, for the Speaker and PAC representative will be covered by the CAL-PT-PAC.

**Other Requirements:**

- All attendees must sign-in on the CAL-PT-PAC Sign-in Sheet including current contact information from all attendees (required for reporting political contributions). The District/SIG is **REQUIRED** to send a copy of the sign-in sheet and raised funds to CPTA within 30 days of the event to ensure prompt FPPC reporting.
- District/SIG Executive Committee or District membership liaison should make sure that handouts and APTA resources are readily on hand - including membership applications. If resources are needed, CPTA staff must be notified no less than 7 days prior to the event.
- The host District/SIG will agree to offer 75 – 100 percent of the course proceeds to the CAL-PT-PAC.
- The host District/SIG will agree to charge \$50 for PT/PTA attendees (CPTA Members Only); Students are Free; \$130 for PT/PTA attendees (Prospective members).
- If an attendee declines to contribute to the CAL-PT-PAC they must check the box on the sign-in sheet and 100% of the course fees will go to the DIS/SIG.
- The host District/SIG will agree to a targeted fundraising goal of \$1500 or more per event (average DIS/SIG annual fundraising goal). If the goal is not reached the District/SIG may sponsor the CAL-PT-PAC for the remaining amount or host additional fundraising events to reach the designated goal amount.

**Additional Information:**

- Political Contributions are not tax deductible