Report of Board of Directors, Committees, and Items of New Business

to be presented to
STATE COUNCIL OF EDUCATION
October 26-27, 2019
Los Angeles, California
OUR MISSION

The California Teachers Association exists to protect and promote the well-being of its members; to improve the conditions of teaching and learning; to advance the cause of free, universal, and quality public education; to ensure that the human dignity and civil rights of all children and youth are protected; and to secure a more just, equitable, and democratic society.
To fulfill its mission, the California Teachers Association pursues the following goals:

I. CTA plans and executes programs and strategies designed to enhance the quality of education for students and the professional and personal lives of its members.

II. CTA assists its local chapters in bargaining for salaries and individual and employment rights in keeping with the academic and professional status of its members.

III. CTA represents members in governmental relations -- to influence state and federal legislation and actions by state and federal agencies.

IV. CTA strengthens its role as the preeminent voice for public education in California -- projects a strong, coherent and consistent image -- such that its members play the major role in shaping public policy on education.

V. CTA represents members in professional and career development matters.

VI. CTA represents members and provides a program of economic benefits and resources for members.

VII. CTA works to maintain and expand its membership so as to remain effective in defending and advancing its members' interests.

VIII. CTA maintains a governance system designed to achieve broad membership involvement and democratic decision-making.

IX. CTA works to encourage ethnic minority member participation.

X. CTA works to promote human and civil rights.

XI. CTA maintains staff, hired in conformance with affirmative action principles, to serve its members.

XII. CTA maintains internal and external communication systems to ascertain its members' priorities, to keep its members informed, and to improve its relations with the public.

XIII. CTA implements NEA policies within California and works to influence the development and content of those policies.
<table>
<thead>
<tr>
<th>COMMITTEE</th>
<th>PAGE</th>
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</thead>
<tbody>
<tr>
<td>Adult, Alternative, &amp; Career Technical Education</td>
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<td>Board Report</td>
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<td>Credentials &amp; Professional Development</td>
<td>U</td>
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<td>Curriculum &amp; Instruction</td>
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<td>Early Childhood Education</td>
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<td>Elections and Credentials</td>
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<td>K</td>
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<td>N</td>
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<td>Professional Rights &amp; Responsibilities</td>
<td>R</td>
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<td>Representation</td>
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<td>Retirement</td>
<td>F</td>
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<td>School Safety/School Management</td>
<td>Q</td>
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<td>Special Education</td>
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<td>Student Support Services</td>
<td>J</td>
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<td>Teacher Evaluation &amp; Academic Freedom</td>
<td>O</td>
</tr>
<tr>
<td>New Business Items</td>
<td>Y</td>
</tr>
</tbody>
</table>
FOR COUNCIL ACTION

1. INCUMBENT CONGRESSIONAL TIERING RECOMMENDATIONS FOR THE MARCH 3, 2020 PRIMARY ELECTION

The attached tiers are recommended by the CTA Board of Directors.  
(Attachment “A”)  
(See Attachment “B” For Explanation of Election Tiering)

RECOMMENDATION:  
Approve. [October 2019]  

Presented By Mel House

2. INCUMBENT LEGISLATIVE TIERING RECOMMENDATIONS FOR THE MARCH 3, 2020 PRIMARY ELECTION

RECOMMENDATION:  
Approve. [October 2019]  

Presented by Roberto Rodriguez

The attached tiers are recommended by the CTA Board of Directors.  
(Attachment “C”)

3. TIERS 1-4 ASSEMBLY AND SENATE CANDIDATE RECOMMENDATIONS FOR THE MARCH 3, 2020 PRIMARY ELECTION

The attached candidates are recommended by the CTA Board of Directors.  
(Attachment “D”)

RECOMMENDATION:  
Approve. [October 2019]  

Presented By Roberto Rodriguez
4. ASSEMBLY CANDIDATE RECOMMENDATION FOR THE AUGUST 27, 2019 SPECIAL PRIMARY ELECTION

**RECOMMENDATION:**

Presented by Roberto Rodriguez

Ratify. [August 2019]

<table>
<thead>
<tr>
<th>District</th>
<th>Candidate</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD 1</td>
<td>Elizabeth Betancourt/D</td>
<td>Recommend</td>
</tr>
</tbody>
</table>

5. CAL/PERSON CANDIDATE RECOMMENDATIONS FOR THE AUGUST 30-SEPTEMBER 30, 2019 ELECTION

**RECOMMENDATION:**

Presented by Roberto Rodriguez

Ratify. [August 2019]

<table>
<thead>
<tr>
<th>Seat</th>
<th>Candidate</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retiree Trustee</td>
<td>Henry Jones</td>
<td>Recommend</td>
</tr>
</tbody>
</table>

FOR COUNCIL INFORMATION

1. Priority Legislation Report

Approved the 2019 Organizational and Legislative Priorities. *(Attachment “E”)*

2. ACT Committee Referral – Tours of Career Technical Education Programs

State Council referred to the CTA Board of Directors the Adult, Alternative and Career Technical Education Committee recommendation that CTA arrange for CTE “tours” of programs in both Northern and Southern California for CTA Officers and Board Members to witness firsthand CTE programs and hear from students and teachers about the positive impact on students and communities.

*The Board approved the recommendation. [June 2019]*

3. CRE Committee Referral — Disrupted Learning Environments

State Council referred to the CTA Board of Directors the Civil Rights in Education Committee recommendation from five committee chairs (ECE, SSM, SPS, SEC, and CRE) that CTA address the on-going crisis of disrupted learning environments in California classrooms by establishing a workgroup to develop a comprehensive campaign to address at minimum the following:

1. Educator and student supports
2. The artificial suppression of data on suspension and expulsion of students
3. Teacher recruitment/retention
4. The lack of students’/educators’ safety
5. Impact on learning
6. Disproportionate impact on students of color and students with special needs

The Board approved that a meeting of the chairs, plus one more committee member, board liaisons and staff consultants, be held on a day outside of Council to determine a plan of action for the committees and State Council. [July 2019]

4. NBI 6/19-1 – Electronic Signatures on Membership Forms
State Council referred to the CTA Board of Directors NBI 6/19-1: CTA will allow electronic signatures on membership forms.

The Board approved NBI 6/19-1. [October 2019]

5. NBI 6/19-2 – Maintenance Dues for CTA Members on Leave
State Council referred to the CTA Board of Directors NBI 6/19-2: CTA will revise its policy on collecting maintenance dues for members on unpaid leaves of absence.

The Board did not approve NBI 6/19-2. Currently, members on unpaid leave are able to maintain membership by paying a significantly reduced dues rate (Cat 3A). [October 2019]

6. NBI 6/19-3 – First Year CTA Dues
State Council referred to the CTA Board of Directors NBI 6/19-3: To encourage new professionals in education to join CTA by making it more affordable either through reduced membership dues the first year or so or even making the first year free.

The Board referred NBI 6/19-3 to the Budget Committee. [June 2019]

7. NBI 6/19-4 – Creation of an Annual Special Education Conference
State Council referred to the CTA Board of Directors NBI 6/19-4: CTA will create a yearly Special Education Conference.

The Board referred NBI 6/19-4 to the Training and Development Committee. [June 2019]
8. **NBI 6/19-5 – Special Education Strand**  
State Council referred to the CTA Board of Directors NBI 6/19-5: CTA will add a Special Education strand to Summer Institute.

_The Board referred NBI 6/19-5 to the Training and Development Committee._  
[June 2019]

State Council referred to the CTA Board of Directors NBI 6/19-6: CTA will create a Charter School Legislation Report Card for legislators.

_The Board did not approve NBI 6/19-6. As this is currently part of the legislation report card, this would be duplicative._  
[October 2019]

10. **NBI 6/19-7 – Contact Means for CTA Members**  
State Council referred to the CTA Board of Directors NBI 6/19-7: CTA will embed in membership forms language that allows members to be contacted on their cell phone (automated calls, text messages, etc.) and home email regarding political campaigns and involvement opportunities.

_The Board declared NBI 6/19-7 moot as this is already being done._  
[October 2019]

11. **NBI 6/19-8 – Submission of Campaign Materials**  
State Council referred to the CTA Board of Directors NBI 6/19-8: CTA will require all candidates to submit drafts of campaign materials, prior to printing or use, to the Elections Committee for evaluation against CTA's election guidelines. Any materials used without the Elections Committee review will be pulled immediately.

_The Board referred NBI 6/19-8 to the Elections and Credentials Committee._  
[June 2019]

12. **NBI 6/19-10 – Campaign Parties at State Council**  
State Council referred to the CTA Board of Directors NBI 6/19-10: All campaign parties will be held on site at State Council and in one common location. All candidates will chip in an equal amount of money in order to cover the catering costs, and if agreed upon by all candidates, a cash bar will be provided.

_The Board referred NBI 6/19-10 to the Elections and Credentials Committee._  
[June 2019]
13. NBI 6/19-11– Organizing of Adjunct Professors/Substitutes  
State Council referred to the CTA Board of Directors NBI 6/19-11: Moved that CTA implement a comprehensive plan for the increased organizing of adjunct professors and teacher substitutes into CTA/NEA to provide economic and professional justice for these itinerant educators.

_The Board approved NBI 6/19-11. [October 2019]_

14. NBI 6/19-13– Publication of Caucus Election Results  
State Council referred to the CTA Board of Directors NBI 6/19-13: CTA will publish in an appropriate and accessible way which regional candidates won their breakfast caucus including the vote tally.

_The Board referred NBI 6/19-13 to the Elections and Credentials Committee. [June 2019]_
CTA/ABC COMMITTEE – INFORMATIONAL ITEMS – NOT FOR COUNCIL ACTION
(Actions occurring after June 2019 State Council Meeting)

The CTA Board of Directors has approved the following recommendations of the
CTA/ABC Committee:

1. Allocate funds for the following Assembly and Senate/CalPERS Campaigns:

<table>
<thead>
<tr>
<th>District</th>
<th>Candidate</th>
<th>Amount</th>
<th>Election</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD 1</td>
<td>Elizabeth Betancourt/D</td>
<td>$500</td>
<td>11/5/2019</td>
</tr>
<tr>
<td>CalPERS Retired</td>
<td>Henry Jones</td>
<td>$9,300</td>
<td>8/30/19-9/30/19</td>
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</table>

2. Allocate funds for the following Local Election Campaign:

<table>
<thead>
<tr>
<th>DD</th>
<th>Chapter</th>
<th>Candidate/Committee/Measure</th>
<th>Amount</th>
<th>Election</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>United Educators of San Francisco</td>
<td>Jenny Lam</td>
<td>$20,000</td>
<td>11/5/19</td>
</tr>
<tr>
<td>A</td>
<td>United Educators of San Francisco</td>
<td>Prop. E: Affordable Homes for Educators &amp; Families Now!</td>
<td>$20,000</td>
<td>11/5/19</td>
</tr>
<tr>
<td>H</td>
<td>Antelope Valley TA</td>
<td>AV Board Recall</td>
<td>$1,875</td>
<td>TBD</td>
</tr>
<tr>
<td>O</td>
<td>Banning Teachers Association</td>
<td>Leslie Sattler, Mayra Anguiano, Laura Troutman, Lucy Martinez Lara</td>
<td>$1,300</td>
<td>11/5/19</td>
</tr>
<tr>
<td>P</td>
<td>Meadows Union TA</td>
<td>Margo Lamoreaux</td>
<td>$750</td>
<td>11/5/2019</td>
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<tr>
<td>P</td>
<td>Meadows Union TA</td>
<td>Sterling “Arkie” Mayes, Jr.</td>
<td>$750</td>
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3. Allocate funds for the following Special Circumstances Grants:

<table>
<thead>
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<th>DD</th>
<th>Chapter</th>
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<th>Amount</th>
<th>Election</th>
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<tbody>
<tr>
<td>A</td>
<td>United Educators of San Francisco</td>
<td>Prop. E: Affordable Homes for Educators &amp; Families Now!</td>
<td>$20,000</td>
<td>11/5/19</td>
</tr>
<tr>
<td>O</td>
<td>Banning Teachers Association</td>
<td>Leslie Sattler, Mayra Anguiano, Laura Troutman, Lucy Martinez Lara</td>
<td>$8,000</td>
<td>11/5/19</td>
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4. Allocate funds for the following State/County Party Campaigns:

<table>
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<th>DD</th>
<th>County</th>
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<th>Amount</th>
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<tbody>
<tr>
<td>A</td>
<td>Lake</td>
<td>The Democratic Party of Lake County</td>
<td>$500</td>
<td>Fundraiser 10/20/2019</td>
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<tr>
<td>A</td>
<td>Humboldt</td>
<td>Humboldt County Democrats</td>
<td>$500</td>
<td>Fundraiser 9/28/2019</td>
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<td>A</td>
<td>Marin</td>
<td>Marin County Democratic Central Committee</td>
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<td>Fundraiser 9/21/2019</td>
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<td>C</td>
<td>Alameda</td>
<td>Alameda County Democratic Central Committee</td>
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<td>Fundraiser 9/28/2019</td>
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<tr>
<td>D</td>
<td>Amador</td>
<td>Amador County Democratic Central Committee</td>
<td>$500</td>
<td>Fundraiser 8/15/2019</td>
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<tr>
<td>D</td>
<td>Placer</td>
<td>Placer County Republican Party</td>
<td>$450</td>
<td>Fundraiser 11/4/2019</td>
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<td>D</td>
<td>Nevada</td>
<td>Nevada County Democratic Central Committee</td>
<td>$500</td>
<td>Fundraiser 10/13/2019</td>
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<td>D</td>
<td>Shasta</td>
<td>Democratic Central Committee of Shasta County</td>
<td>$500</td>
<td>Fundraiser 10/19/2019</td>
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<tr>
<td>D</td>
<td>Shasta</td>
<td>Shasta County Republican CC</td>
<td>$360</td>
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<td>D</td>
<td>Sutter</td>
<td>Sutter County Democratic Central Committee</td>
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<td>D</td>
<td>Yolo</td>
<td>Yolo County Democratic Party</td>
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<td>Ventura County Democratic Central Committee</td>
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<td>San Bernardino County Democratic Central Committee</td>
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<td>Fundraiser 11/2/2019</td>
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<td>M</td>
<td>Orange</td>
<td>Republican Party of Orange County</td>
<td>$2,000</td>
<td>Fundraiser 6/15/2019</td>
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<td>M</td>
<td>Riverside</td>
<td>Republican Party of Riverside County</td>
<td>$1,250</td>
<td>Fundraiser 10/5/2019</td>
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<td>Riverside County Democratic Central Committee</td>
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<td>N</td>
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<td>Democratic Party of Orange County</td>
<td>$2,000</td>
<td>Fundraiser 9/28/2019</td>
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### CONGRESSIONAL TIERING RECOMMENDATIONS FOR THE MARCH 3, 2020 ELECTION.

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<thead>
<tr>
<th>District</th>
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<th>Party</th>
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<td>Doug LaMalfa</td>
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<td>CD 2</td>
<td>Jared Huffman</td>
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<tr>
<td>CD 3</td>
<td>John Garamendi</td>
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<tr>
<td>CD 4</td>
<td>Tom McClintock</td>
<td>R</td>
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<td>CD 5</td>
<td>Mike Thompson</td>
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<tr>
<td>CD 6</td>
<td>Doris Okada Matsui</td>
<td>D</td>
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<td>Recommend</td>
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<tr>
<td>CD 7</td>
<td>Ami Bera</td>
<td>D</td>
<td>1</td>
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<tr>
<td>CD 8</td>
<td>Paul Cook</td>
<td>R</td>
<td>4</td>
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<tr>
<td>CD 9</td>
<td>Jerry McNerney</td>
<td>D</td>
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<td>Recommend</td>
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<tr>
<td>CD 10</td>
<td>Josh Harder</td>
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<td>Recommend</td>
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<tr>
<td>CD 11</td>
<td>Mark DeSaulnier</td>
<td>D</td>
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<td>Recommend</td>
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<tr>
<td>CD 12</td>
<td>Nancy Pelosi</td>
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<tr>
<td>CD 13</td>
<td>Barbara Lee</td>
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<td>1</td>
<td>Recommend</td>
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<tr>
<td>CD 14</td>
<td>Jackie Speier</td>
<td>D</td>
<td>1</td>
<td>Recommend</td>
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<tr>
<td>CD 15</td>
<td>Eric Swalwell</td>
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<td>1</td>
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</tr>
<tr>
<td>CD 16</td>
<td>Jim Costa</td>
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<tr>
<td>CD 17</td>
<td>Ro Khanna</td>
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</tr>
<tr>
<td>CD 18</td>
<td>Anna G. Eshoo</td>
<td>D</td>
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<tr>
<td>CD 19</td>
<td>Zoe Lofgren</td>
<td>D</td>
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<td>CD 20</td>
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</tr>
<tr>
<td>CD 21</td>
<td>TJ Cox</td>
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<tr>
<td>CD 22</td>
<td>Devin Nunes</td>
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<tr>
<td>CD 23</td>
<td>Kevin McCarthy</td>
<td>R</td>
<td>3</td>
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<tr>
<td>CD 24</td>
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</tr>
<tr>
<td>CD 25</td>
<td>Katie Hill</td>
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<td>1</td>
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</tr>
<tr>
<td>CD 26</td>
<td>Julia Brownley</td>
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<td>1</td>
<td>Recommend</td>
</tr>
<tr>
<td>CD 27</td>
<td>Judy Chu</td>
<td>D</td>
<td>1</td>
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</tr>
<tr>
<td>CD 28</td>
<td>Adam B. Schiff</td>
<td>D</td>
<td>1</td>
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</tr>
<tr>
<td>CD 29</td>
<td>Tony Cardenas</td>
<td>D</td>
<td>1</td>
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</tr>
<tr>
<td>CD 30</td>
<td>Brad Sherman</td>
<td>D</td>
<td>1</td>
<td>Recommend</td>
</tr>
<tr>
<td>CD 31</td>
<td>Pete Aguilar</td>
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</tr>
<tr>
<td>CD 32</td>
<td>Grace F. Napolitano</td>
<td>D</td>
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<td>CD 33</td>
<td>Ted Lieu</td>
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<tr>
<td>CD 34</td>
<td>Jimmy Gomez</td>
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<tr>
<td>CD 35</td>
<td>Norma J. Torres</td>
<td>D</td>
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<tr>
<td>CD 36</td>
<td>Raul Ruiz</td>
<td>D</td>
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<tr>
<td>CD 37</td>
<td>Karen Bass</td>
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<tr>
<td>CD 38</td>
<td>Linda T. Sanchez</td>
<td>D</td>
<td>1</td>
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<tr>
<td>CD 39</td>
<td>Gilbert Ray Cisneros</td>
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<tr>
<td>CD 40</td>
<td>Lucille Roybal-Allard</td>
<td>D</td>
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Tiering of Elections:

a. **Tier 1 Elections:** A tier one election is identified as containing a candidate who is running for re-election in the same house of the legislature or in Congress and based on the CTA Assessment Rubric, has excellent ratings in at least four out of five of the categories: voting record, access at the capitol, access in the district, communications and leadership.

Tier 1 Candidates, in order to be recommended by CTA, must complete a written questionnaire. The recommendation is not final until it is referred to the CTA Board of Directors and CTA State Council of Education for approval.

b. **Tier 2 Elections:** A tier two election is identified as containing a candidate who is running for re-election in the same house of the legislature or in Congress and based on the CTA Assessment Rubric, has excellent ratings in at least three out of five of the categories: voting record, access at the capitol, access in the district, communications and leadership.

Tier 2 Candidates, in order to be recommended by CTA must have a face-to-face meeting with a CTA local team to address any concerns and complete a written questionnaire. The recommendation is not final until it is referred to the CTA Board of Directors and CTA State Council of Education for approval.

c. **Tier 3 Elections:** A tier three race is identified as containing a candidate who is running for re-election in the same house of the legislature or Congress and CTA recommends that an interview take place.

In these elections CTA will either:

a) Interview viable candidates, to consider a pre-primary recommendation
b) Interview post primary – as it is in CTA’s best interest to wait and either make a recommendation at that time or recommend no action.

Incumbents may be invited to interview along with their primary/general election challengers; the process will include a video-recorded oral interview and written questionnaire. The recommendation is not final until it is referred to the CTA Board of Directors and CTA State Council of Education for approval.

d. **Tier 4 Elections:** A tier four race is identified as any race, including special elections, in which there are no candidates running for re-election. In these districts CTA will either:

a) Interview viable candidates to consider a pre-primary recommendation
b) Interview post primary – as it is in CTA’s best interest to wait and either make a recommendation at that time or recommend no action.

The process will include a video-recorded oral interview and written questionnaire. The recommendation is not final until it is referred to the CTA Board of Directors and CTA State Council of Education for approval.

e. **Tier 5 Elections:** A tier five race is identified as any race with multiple Tier 1 and 2 candidates running against one another, and automatically defers the recommendation process until post-primary.
FOR COUNCIL ACTION

ASSEMBLY AND SENATE TIERING RECOMMENDATIONS FOR THE MARCH 3, 2020 ELECTION.

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**Senate**

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| SD 03 | Bill Dodd | D | 1 | Recommend |</p>
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## TIER 1 AND 2 ASSEMBLY AND SENATE CANDIDATE RECOMMENDATIONS FOR THE MARCH 3, 2020 PRIMARY ELECTION

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</tr>
<tr>
<td>AD 21</td>
<td>Adam Gray (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
<tr>
<td>AD 22</td>
<td>Kevin Mullin (D)</td>
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</tr>
<tr>
<td>AD 27</td>
<td>Ash Kalra (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 29</td>
<td>Mark Stone (D)</td>
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<tr>
<td>AD 32</td>
<td>Rudy Salas (D)</td>
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<tr>
<td>AD 35</td>
<td>Jordan Cunningham (R)</td>
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<tr>
<td>AD 38</td>
<td>Christy Smith (D)</td>
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<tr>
<td>AD 39</td>
<td>Luz Rivas (D)</td>
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<tr>
<td>AD 40</td>
<td>James Ramos (D)</td>
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<td>AD 41</td>
<td>Chris Holden (D)</td>
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<tr>
<td>AD 46</td>
<td>Adrin Nazarian (D)</td>
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<tr>
<td>AD 45</td>
<td>Jesse Gabriel (D)</td>
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<tr>
<td>AD 49</td>
<td>Ed Chau (D)</td>
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<tr>
<td>AD 52</td>
<td>Freddie Rodriguez (D)</td>
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<tr>
<td>AD 53</td>
<td>Miguel Santiago (D)</td>
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<tr>
<td>AD 54</td>
<td>Sydney Kamlager-Dove (D)</td>
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<tr>
<td>AD 56</td>
<td>Eduardo Garcia (D)</td>
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<tr>
<td>AD 57</td>
<td>Ian Calderon (D)</td>
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<tr>
<td>AD 58</td>
<td>Cristina Garcia (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 59</td>
<td>Reggie Jones-Sawyer (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 61</td>
<td>Jose Medina (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 63</td>
<td>Anthony Rendon (D)</td>
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<tr>
<td>AD 64</td>
<td>Mike Gipson (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 65</td>
<td>Sharon Quirk-Silva (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 66</td>
<td>Al Muratsuchi (D)</td>
<td>Recommend</td>
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</tr>
<tr>
<td>AD 70</td>
<td>Patrick O’Donnell (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 74</td>
<td>Cottie Petrie-Norris (D)</td>
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<tr>
<td>AD 76</td>
<td>Tasha Boerner Horvath (D)</td>
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<tr>
<td>AD 77</td>
<td>Brian Maienschein (D)</td>
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<tr>
<td>AD 80</td>
<td>Lorena Gonzalez (D)</td>
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</tr>
<tr>
<td>District</td>
<td>Candidate</td>
<td>Recommendation</td>
<td>CTA Board Recommendation</td>
</tr>
<tr>
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<tr>
<td><strong>Senate</strong></td>
<td></td>
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</tr>
<tr>
<td>SD 09</td>
<td>Nancy Skinner (D)</td>
<td>Recommend</td>
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</tr>
<tr>
<td>SD 27</td>
<td>Henry Stern (D)</td>
<td>Recommend</td>
<td>Recommend</td>
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<tr>
<td>SD 31</td>
<td>Richard Roth (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
<tr>
<td>SD 39</td>
<td>Toni Atkins (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
</tbody>
</table>

**TIER 3 AND 4 ASSEMBLY, SENATE CANDIDATE RECOMMENDATIONS FOR THE MARCH 3, 2020 PRIMARY ELECTION**

<table>
<thead>
<tr>
<th>District</th>
<th>Candidate</th>
<th>Local Recommendation</th>
<th>CTA Board Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assembly</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>AD 13</td>
<td>Carlos Villapudua (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
<tr>
<td>AD 25</td>
<td>Anna Song (D)</td>
<td>Recommend</td>
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<tr>
<td>AD 68</td>
<td>Melissa Fox (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
<tr>
<td>AD 78</td>
<td>Chris Ward (D)</td>
<td>Recommend</td>
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</tr>
<tr>
<td><strong>Senate</strong></td>
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<tr>
<td>SD 5</td>
<td>Susan Eggman (D)</td>
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<tr>
<td>SD 13</td>
<td>Shelly Masur (D)</td>
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<tr>
<td>SD 15</td>
<td>David Cortese (D)</td>
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</tr>
<tr>
<td>SD 17</td>
<td>John Laird (D)</td>
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</tr>
<tr>
<td>SD 23</td>
<td>Kris Goodfellow (D)</td>
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</tr>
<tr>
<td>SD 29</td>
<td>Josh Newman (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
<tr>
<td>SD 37</td>
<td>David Min (D)</td>
<td>Recommend</td>
<td>Recommend</td>
</tr>
</tbody>
</table>
# 2019 Organizational and Legislative Priorities

## Matrix Key
- Red Text = new proposal
- Highlight Only = position change

<table>
<thead>
<tr>
<th>CTA Co-Sponsored Legislation</th>
<th>Committee</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB 258 (Jones-Sawyer - D) – Pupil health: School-Based Pupil Support Services Act Program</td>
<td>SPS</td>
<td>Vetoed by the Governor</td>
</tr>
<tr>
<td>AB 843 (Rodriguez - D) – Student financial aid: Assumption Program of Loans for Education</td>
<td>CPD</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>AB 1322 (Berman - D) – School-based health programs</td>
<td>SPS</td>
<td>Vetoed by the Governor</td>
</tr>
<tr>
<td>AB 1505 (O’Donnell - D) – Charter schools: petitions</td>
<td>NEG</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>SB 468 (Jackson - D) – Taxation: tax expenditures: California Tax Expenditure Review Board</td>
<td>FPE</td>
<td>Vetoed by the Governor</td>
</tr>
<tr>
<td>SB 756 (Durazo - D) – Charter schools: moratorium</td>
<td>NEG</td>
<td>2-Year Bill</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CTA Supported Legislation</th>
<th>Committee</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB 5 (Gonzalez - D) – Worker status: employees and independent contractors</td>
<td>NEG</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>AB 39 (Muratsuchi - D) – Education finance: local control funding formula: aspirational funding level: reports</td>
<td>FPE</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>AB 74 (Ting - D) – Budget Act of 2019</td>
<td>FPE</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>AB 91 (Burke - D) – Income taxation: Loophole Closure and Small Business and Working Families Tax Relief Act of 2019</td>
<td>FPE</td>
<td>Signed by the Governor</td>
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<tr>
<td>AB 147 (Burke - D) – Use taxes: collection: retailer engaged in business in this state: marketplace facilitators</td>
<td>FPE</td>
<td>Signed by the Governor</td>
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<tr>
<td><strong>CTA Supported Legislation</strong></td>
<td><strong>Committee</strong></td>
<td><strong>Status</strong></td>
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<tr>
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<tr>
<td>AB 196 (Gonzalez - D) – Paid family leave</td>
<td>NEG</td>
<td>2-Year Bill</td>
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<tr>
<td>AB 263 (Burke - D) – Taxation: tax expenditures: information</td>
<td>FPE</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>AB 314 (Bonta - D) – Public employment: labor relations: release time</td>
<td>NEG</td>
<td>Vetoed by the Governor</td>
</tr>
<tr>
<td>AB 331 (Medina - D) – Pupil instruction: high school graduation requirements: ethnic studies</td>
<td>C&amp;I</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>AB 418 (Kalra - D) – Evidentiary privileges: union agent-represented worker privilege</td>
<td>NEG</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>AB 493 (Gloria - D) – Teachers: lesbian, gay, bisexual, transgender, queer, and questioning pupil resources and training</td>
<td>CRE</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>AB 500 (Gonzalez - D) – School and community college employees: paid maternity leave</td>
<td>NEG</td>
<td>Vetoed by the Governor</td>
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<tr>
<td>AB 1353 (Wicks - D) – Classified employees: probationary period</td>
<td>PR&amp;R</td>
<td>Signed by the Governor</td>
</tr>
<tr>
<td>AB 1506 (McCarty - D) – Charter schools: statewide total: authorization restrictions</td>
<td>NEG</td>
<td>2-Year Bill</td>
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<tr>
<td>AB 1507 (Smith - D) – Charter schools: location: resource center</td>
<td>NEG</td>
<td>Signed by the Governor</td>
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<tr>
<td>SB 37 (Skinner - D) – Corporation taxes: tax rates</td>
<td>FPE</td>
<td>Re-referred to Senate Rules Committee</td>
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<tr>
<td>SB 75 (Budget &amp; Fiscal Review Committee) – Education finance: education omnibus budget trailer bill</td>
<td>FPE</td>
<td>Signed by the Governor</td>
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<tr>
<td>SB 76 (Budget &amp; Fiscal Review Committee) – Education finance: constitutional minimum funding obligation: inflation and cost-of-living adjustments</td>
<td>FPE</td>
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<tr>
<td>SB 77 (Budget &amp; Fiscal Review Committee) – Higher education trailer bill</td>
<td>FPE</td>
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<tr>
<td>SB 90 (Budget &amp; Fiscal Review Committee) – Public employees’ retirement</td>
<td>FPE</td>
<td>Signed by the Governor</td>
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<tr>
<td>SB 126 (Leyva - D) – Charter schools</td>
<td>NEG</td>
<td>Signed by the Governor</td>
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*as of 10/14/2019*
<table>
<thead>
<tr>
<th>CTA Supported Legislation</th>
<th>Committee</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB 246 (Wieckowski - D) – Oil and gas severance tax</td>
<td>FPE</td>
<td>Senate Rules Committee</td>
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<tr>
<td>SB 614 (Rubio - D) – Teacher credentialing: reading instruction</td>
<td>CPD</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>SB 716 (Mitchell- D) – Juveniles: delinquency: postsecondary academic and career technical education</td>
<td>ACT</td>
<td>Signed by the Governor</td>
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<tr>
<td>SCA 5 (Hill - D) – Taxation: school districts: parcel tax</td>
<td>FPE</td>
<td>Senate Inactive File</td>
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</table>

<table>
<thead>
<tr>
<th>CTA Opposed Legislation</th>
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<th>Status</th>
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<tbody>
<tr>
<td>AB 11 (Chiu - D) – Community Redevelopment Law of 2019</td>
<td>FPE</td>
<td>2-Year Bill</td>
</tr>
<tr>
<td>AB 1078 (Weber - D) – Certificated school employees: permanent status</td>
<td>PR&amp;R</td>
<td>2-Year Bill</td>
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<tr>
<td>SB 5 (Beall - D) – Affordable Housing and Community Development Investment Program</td>
<td>FPE</td>
<td>Vetoed by the Governor</td>
</tr>
<tr>
<td>SB 328 (Portantino - D) – Pupil attendance: school start time</td>
<td>NEG</td>
<td>Signed by the Governor</td>
</tr>
</tbody>
</table>

as of 10/14/2019
ELECTIONS AND CREDENTIALS COMMITTEE

Jeanne Marks, Chairperson
Manny Lopez, Vice Chairperson
Barbara Dawson, Board Liaison
Sandra Jones, Co-Consultant
Peg Tracey, Co-Consultant
Jim Rogers, Co-Consultant

RECOMMENDATIONS TO THE BOARD:

None

INFORMATIONAL ITEMS:

1. Upcoming special elections to complete an unexpired term:
   CTA Board of Directors, District Q
   Term of office: Date of election - 6/25/2022, or until State Council
   votes to change the District Q boundaries, whichever comes first.
   CTA/ABC Committee Member, District I
   Term of office: Date of election – August 31, 2020

2. Future elections for this year:
   NEA Director
   District 1
   District 3
   District 10
   District 12
   Term of office: September 1, 2020 – August 31, 2023
CTA BUDGET COMMITTEE

October 26, 2019
San Pedro Room
Westin Bonaventure Hotel

Agenda

I. Call to Order

II. Election of Vice Chair --- Elections Committee (Time Certain 9:00 AM)

III. Report of the Chair

IV. Report of the Subcommittees
   A. Budget Tracking
      1. Election of Subcommittee Chair
      2. Budget Variance Reports
   B. Interim Issues
      1. Election of Subcommittee Chair
      2. Review of Election Expense Reimbursements to Service Center Councils
      3. NBI 6/19-3 (New Professionals Dues Reduction)
   C. Procedures/Format
      1. Election of Subcommittee Chair
      2. January Managers Budget Hearing - Planning
      3. Strategic Budget Survey Report

V. Committee as a Whole
   A. Working Draft Budget 2020-2021
   B. Roundtable Service Center Councils Recap
   C. Membership Engagement Grants
   D. Review of August 2019 Budget Committee Training
   E. Strategic Budget

A BUDGET FORUM WILL BE HELD FROM 2:30 - 3:30 P.M.
IN SAN PEDRO ROOM
(yellow tower, lobby level, next to the computer room)

FYI: Strategic Budget Survey: www.ctago.org/budget
AGENDA

1. Call to Order
2. Approval of Minutes – August 22, 2019 Meeting
3. Committee Changes
4. Committee Chairs Meeting Report
5. Concerns for the Board
6. Consultant’s Report
7. 2020-2021 State Council Redistricting
8. State Council Information Reporting Forms for Breakfast Caucuses
9. Other Business
10. Adjournment
CURRICULUM AND INSTRUCTION COMMITTEE

Pia VanMeter, Chairperson
Karin Barone, Vice Chairperson
Mel House, Board Liaison
Marlene Fong, Consultant
Bruce Saathoff, Consultant
Isabelle Garcia, Legislative Advocate

MAJOR POLICY: For Immediate Action (2/3 vote required)

(None)

MAJOR POLICY: Second Reading

(None)

MAJOR POLICY: First Reading

(None)

OTHER ITEMS FOR IMMEDIATE ACTION

(None)

REFERRALS TO THE BOARD OF DIRECTORS

(None)

MATTERS PENDING

(None)

INFORMATIONAL ITEMS

1. The committee supports CTA signing on to the Ed Trust West Coalition letter of opposition to the CSU Chancellor’s proposed expansion of the quantitative reasoning admissions requirement. CTA has already sent a formal letter opposing the additional requirements. The committee believes that we should join other education organizations in signing a joint letter of opposition.

2. The California Department of Education (CDE) has developed a survey to solicit feedback from stakeholders regarding both the draft Local Control and Accountability Plan Template (LCAP) and draft LCAP Template instructions. The survey will be available from October 9, 2019 through November 1, 2019. The survey may be accessed here: https://www.lcapredesign.org/
3. Mel House, Board of Director liaison to the committee, stressed the importance of reaching out and talking to everyone about the merits and importance of Schools and Communities First.

4. Members of the committee reviewed the California Arts Framework.
RETIREMENT COMMITTEE

Leonard Goldberg, Chairperson
Kevin Welch, Vice Chairperson
Joe Bartell, Board Liaison
Mitch Olson, Co-Consultant
Rose Luna-Nuñez, Co-Consultant
Lori Esterling, Manager Legislative Relations

MAJOR POLICY – Immediate Action (2/3 vote required)

NONE

MAJOR POLICY

NONE

OTHER ITEMS FOR IMMEDIATE ACTION

NONE

REFERRALS TO THE BOARD OF DIRECTORS

The CTA State Council Retirement Committee voted to recommend that CTA support Karen Yamamoto to continue as a CalSTRS Board Member utilizing all appropriate means as deemed allowable per CTA Policy and as recommended by the CTA Board and/or CTA management.

MATTERS PENDING

NBI #: 10/19-3 The committee has asked staff to research the legality of the NBI, and staff will report back to the committee at the next meeting.

INFORMATIONAL ITEMS

If there are any questions regarding the items in this report, please contact the Committee leadership or staff.

1. Lori Esterling, Manager Legislative Relations, explained the complexities and issues around divestment. She shared with the committee that the legislature wants to direct how money is invested, but is almost always unwilling to indemnify the fund against potential loss of funding. She encouraged the committee to continue to keep lines of communication open with other State Council committees on the issue going forward.

NEA continues to work on legislation to eliminate the Government Pension Offset (GPO) and the Windfall Elimination Provision (WEP).
Additionally, she spoke to how other education groups (ACSA, CASBO, etc.) continue to raise concerns about how much money CalSTRS costs school districts. She shared the history of how the CalSTRS full funding plan was created and that the above-mentioned groups were at the table when decisions were made. She also shared that CalSTRS is projecting that contributions that the employers are required to make will likely go down in future years—a fact that districts fail to acknowledge. The rhetoric is harmful because it feeds into the forces who want to eliminate defined benefits for public workers and convert the retirement system into a defined contribution plan.

2. Karen Yamamoto, CalSTRS Board Member, spent time with the committee explaining what it means to be a trustee with fiduciary responsibilities that include maintaining a viable CalSTRS Defined Benefit. She told the committee that as a fiduciary, she must make decisions based on the best interest of the fund, its members, and beneficiaries. She takes her responsibility very seriously and always acts with the utmost integrity and ethics.

As a board member, she serves on several CalSTRS committees and is constantly continuing her education so that she can make the best decisions possible as a trustee.

She reminded the committee of importance of logging into their MyCalSTRS account and checking to make sure members have an up-to-date beneficiary registration.

3. Dana Dillon, CalSTRS Board Members, gave an overview of the structure and function of the CalSTRS Board and a broad summary of who the system serves.

She shared important information on how CalSTRS is addressing global climate change with its institutional clout. CalSTRS has adopted a low carbon investment strategy in order to maintain a viable long-term and sustainable fund for generations of educators to come.

4. Jackie Lee, liaison to CalPERS, reported that CalPERS has cut the number of meetings from 11 to 6 starting in January 2020. One meeting will be dedicated to a stakeholder’s forum in Sacramento.

5. Marc Sternberger, President to CTA/NEA Retired, reported that CTA/NEA Retired is firmly behind Schools and Communities First campaign. They will be providing accurate talking points to its members of what this campaign is and what it’s not, dispelling the misinformation that is being targeted to seniors.

Marc informed the committee of a CalSTRS Cadre that has been formed to field questions regarding CalSTRS program.

HR 4540 was introduced in the House of Representatives to address the inequities in Social Security and public pension recipients. NEA has a position of watch because the bill only targets the Windfall Elimination Provision (WEP.)
6. Joe Bartell, CTA Board Liaison, reported on School and Community First campaign and the roll out at State Council. He explained that the proposition attempts to fix a loophole in Proposition 13 that allows big corporations to avoid property tax reassessment. The proposition protects residential and agricultural land from reassessment.

7. Leonard Goldberg, Retirement Committee Chair, reviewed the information packet that committee members received.

8. Ed Foglia, CTA/NEA Retired, reported on the CalSTRS Supplemental Benefit Maintenance Account (SBMA) excess funds. The fund currently has a balance that has grown over the years. The committee was provided with information on this fund and will continue its discussion at future meeting.

The Value of CalSTRS Engagements

CalSTRS invests a multi-billion dollar fund in a unique and complex social-economic milieu and recognizes it can neither operate nor invest in a vacuum. As a significant investor with a very long-term investment horizon, engagement is a critical tool used by the CalSTRS Sustainable Investment and Stewardship Strategies team to influence changes in public policies and corporate practices that support long-term value creation.

CalSTRS engages, through meetings, letters, shareholder proposals, investor coalitions and proxy voting, to influence companies to adopt best practices in managing environmental, social and governance issues to create sustainable businesses. CalSTRS also engages policymakers to codify strong governance practices that improve the financial market landscape for long-term investors and their beneficiaries. CalSTRS’ history of engagement activities has resulted in better relationships and outcomes across global industries.

Engagement Spotlight

Principles for a Responsible Civilian Firearms Industry

Since the launch of the Principles for a Responsible Civilian Firearms Industry in November 2018, CalSTRS and 13 other investor signatories (representing $5 trillion in assets under management) have influenced multiple parts of the firearms industry value chain. These strategies include identifying retail best practices, understanding loopholes in the firearms secondary market and developing metrics and measurements to identify risk and increase safety.

In response to the misuse of firearms in several recent mass shooting events in Texas, Ohio and California, large retailers voluntarily made significant changes to their firearms policies. Reforms include limiting open carry in retail locations, shifting inventory away from military-style weapons and ammunition, and re-examining the education and training of retail employees and firearms purchasers.

Signatories of the Principles are engaging retailers to better understand the factors contributing to these business decisions and how to effectively expand best practices across the retail sector.

Additionally, signatories are analyzing the firearms industry supply chain to detect practices that compromise safety through theft, loss and malfeasance.

The table below outlines some current federal requirements and the corresponding best practices that signatories are advocating for within the industry:

<table>
<thead>
<tr>
<th>Federal Requirements</th>
<th>Retail Best Practice Trends</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 years old to purchase a long gun</td>
<td>✓ 21 years old to purchase any firearm</td>
</tr>
<tr>
<td>Sale permitted w/o completed background check after 72 hours</td>
<td>✓ No sale without passing background check</td>
</tr>
<tr>
<td>Permits sales of military style rifles</td>
<td>✓ No sales of military style rifles</td>
</tr>
</tbody>
</table>

Duke Energy: CalSTRS leads Climate Action 100+ Engagement

In September, Duke Energy announced an updated climate strategy that would reduce its carbon emissions by half, or more, from 2005 levels by 2030. Since 2005, the company has already cut emissions by 31 percent.

Furthermore, the company established a goal of achieving net-zero carbon emissions by 2050. To meet the reduction goals, Duke will transition from coal and invest in solar, nuclear and other carbon-free technologies, as well as natural gas, in electricity generation.

Duke Energy is one of the focus companies of Climate Action 100+, an investor-led initiative focused on urging the world's largest corporate greenhouse emitters to act on climate change. CalSTRS is leading a group of global investors in engaging Duke Energy, to assess the risks associated with climate change and adjust its business strategy and operations accordingly.

As a global institutional investor with a focus on the long-term, CalSTRS recognizes that climate change presents a material and existential risk to society and the economy. We are committed to influencing public policies, engaging with the companies in our portfolio and investing to promote an orderly transition to a low-carbon economy that benefits all. Participation in Climate Action 100+ and our engagement with Duke Energy is one such example of this commitment.

Goal: 50% carbon emissions reduction by 2030
Goal: Net-zero carbon emissions by 2050

Duke Energy is one of the focus companies of Climate Action 100+, an investor-led initiative focused on urging the world's largest corporate greenhouse emitters to act on climate change. CalSTRS is leading a group of global investors in engaging Duke Energy, to assess the risks associated with climate change and adjust its business strategy and operations accordingly.

Engagement Priorities (Jul 1, 2019 – Sep 30, 2019 Updates)

- **Events**
  - Staff and CalSTRS board members attended and spoke at the Council of Institutional Investors (CII) Fall Conference, Principles for Responsible Investment (PRI) in Person 2019, and Climate Week in New York City. Attending these events helps us build relationships that improve our collaboration with other industry participants and keeps us informed of global best practices in sustainable investing.

- **Transition to a Low-Carbon Economy**
  - CalSTRS joined 200 investors, representing $6.5 trillion in assets, in calling on 47 of the largest U.S. publicly-traded corporations to align their climate lobbying with the goals of the Paris Agreement, warning that lobbying activities that are inconsistent with meeting climate goals are an investment risk.
  - Ahead of the United Nations Climate Action Summit, CalSTRS was one of 515 institutions, managing $35 trillion in assets, that delivered the Global Investor Statement to Governments on Climate Change. The statement calls on governments to: phase out thermal coal power worldwide, put a meaningful price on carbon pollution, end government subsidies for fossil fuels and update and strengthen nationally-determined contributions to meet the emissions reduction goal of the Paris Agreement no later than 2020. The U.N. Secretary General mentioned the importance of hearing investor voices in his comments to the General Assembly.
Engagement Priorities (continued from previous page)

- **Human Capital Management & Diversity**
  - California Senate Bill (SB) 826, a bill signed in 2018 requiring California-headquartered companies to appoint women to their board, accelerated our engagement efforts on board diversity. Of the 91 companies we engaged over a one-year period, 65 companies appointed 77 women directors. Twelve of these companies added 2 or more female directors. Of the 77 appointments, 10 were minority females and 7 were from non-traditional backgrounds, such as academia, the non-profit sector or other public service.
  - At the recommendation of the Investor Advisory Committee to the Securities and Exchange Commission; the SEC put out for comment proposed rulemaking to Regulation S-K which includes better disclosure requirements on human capital management objectives.

- **Opioids Crisis**
  - A number of settlements were announced ahead of multi-district, federal opioid-related litigation. This includes settlements from Insys Therapeutics and Purdue Pharma, the first two drug makers driven to bankruptcy as a result of litigation over the nation’s opioid crisis.
  - The Investors for Opioid Accountability coalition continues to engage with companies regarding shareholder resolutions filed in the 2019 proxy season. One resolution, requesting the implementation of a misconduct clawback policy, won majority support at Mylan. Reports are due imminently to the coalition from Teva, Rite Aid, Mylan, AmerisourceBergen and Mallinckrodt on how boards are overseeing opioid-related risks.
  - Mallinckrodt recently released its 2018 Political Transparency Report, as requested by CalSTRS through a shareholder proposal. Our proposal was subsequently withdrawn after settlement with the company. The company committed to publish the report annually, which will allow investors to determine how the company's political contributions may be affecting legislation, including opioid-related legislation.

- **Financial Markets and Regulation**
  - CalSTRS submitted a letter to the SEC Division of Corporation Finance on Rule 14a-8 No-action requests relating to shareholder proposals, which are an important tool to ensure that shareholder proposals are not wrongfully left off company proxy statements.
  - CalSTRS signed on to a Council of Institutional Investors letter to SEC Commissioners expressing deep concern on the proposed Proxy Advisor Regulations, which will undermine investor protection and efficiency in the corporate governance voting process.
  - Ahead of The We Company’s (parent company to WeWork) initial public offering (IPO), CalSTRS wrote to the company asking it to reform various poor governance practices that could negatively impact the performance of the company. The company has since recommended significant positive governance revisions and has postponed its IPO.
CalSTRS often partners with our pension fund peers and other like-minded institutional investors to enhance our influence around issues that may pose risks or otherwise impact the performance of our portfolio. Below are some of the global coalitions and initiatives in which CalSTRS participates:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Force on Climate-Related Financial Disclosure (TCFD)</td>
<td>In 2017, CalSTRS committed to engage at least 100 companies (20 per year for five years) to encourage them to provide better disclosure regarding climate risk in line with the recommendations of the Task Force on Climate-related Financial Disclosure. TCFD developed voluntary, consistent climate-related financial risk disclosures for use by companies in providing information to investors.</td>
</tr>
<tr>
<td>Climate Action 100+ (CA 100)</td>
<td>CalSTRS is actively involved in the Climate Action 100+, a collaborative engagement effort of more than 370 global investors — currently representing more than $35 trillion assets under management — focused on the largest global emitters of carbon dioxide. The five-year effort centers around actions the companies are taking, or plan to take, to manage and mitigate climate change risk.</td>
</tr>
<tr>
<td>Thirty Percent Coalition</td>
<td>CalSTRS collaborates with the Thirty Percent Coalition, the California Initiative (UCOP, LACERA, and CalPERS) and the Coalition of 6 global investors (LGIM, APG, OPERS, PGGM, RPMI) specifically to engage boards of companies with either no women or only one woman on their board.</td>
</tr>
<tr>
<td>Human Capital Management (HCM) Coalition</td>
<td>CalSTRS is an active participant in the Human Capital Management Coalition, whose goal is to elevate and emphasize human capital management as a critical component of a company’s economic performance. Engagement encourages better disclosure of how companies manage the demographics, composition, knowledge, motivation, skills and experience of a company’s most valuable asset: their workforce.</td>
</tr>
<tr>
<td>Principles for a Responsible Civilian Firearms Industry</td>
<td>CalSTRS leads a coalition supporting five principles that provide a framework for institutional investors seeking to improve engagement with global public and private companies that manufacture, distribute, sell or regulate products within the civilian firearms industry to address gun safety issues and reduce investment risk.</td>
</tr>
<tr>
<td>Investors for Opioid Accountability</td>
<td>CalSTRS is an active participant in Investors for Opioid Accountability, a diverse coalition of institutional investors with 54 members representing $3.5 trillion in assets. The IOA was established to engage with opioid manufacturers, distributors, treatment manufacturers, and retail pharmacies on opioid business risks that have implications for long-term shareholders, communities and the broader economy.</td>
</tr>
<tr>
<td>Sustainability Accounting Standards Board</td>
<td>CalSTRS is a member of the Sustainability Accounting Standards Board’s (SASB) Investor Advisory Group (IAG), a group of 44 global investors currently representing $32 trillion in assets. Members share a common goal: seeking consistent, comparable, and reliable disclosure of material, decision-useful sustainability-related information from the companies in which they invest to better evaluate and price ESG-related risks and opportunities.</td>
</tr>
</tbody>
</table>
CalSTRS regularly publishes reports to outline our efforts around engagements and issues of interest. Some of the reports include:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CalSTRS Engagement Plan</strong></td>
<td>Each fiscal year, the CalSTRS Sustainable Investment and Stewardship Strategies staff, with input from the Teachers’ Retirement Board, determines key engagement issues. The issues are chosen due to their link to long-term value creation.</td>
</tr>
<tr>
<td><strong>Green Initiative Task Force Annual Report</strong></td>
<td>The Green Initiative Task Force, known as the “Green Team,” was established in 2007 to identify, analyze and propose environmentally-focused investment opportunities and risk-control strategies. The focus team considers risks and opportunities related to issues such as carbon emissions, land use, water sourcing, mineral extraction and waste disposal.</td>
</tr>
<tr>
<td><strong>Diversity in the Management of Investments</strong></td>
<td>Diversity in the management of investments is interwoven throughout the CalSTRS Investment Branch business goals and is consistent with our objective to invest in strategies that enhance returns at a prudent level of risk.</td>
</tr>
<tr>
<td><strong>Low-Carbon Factsheet</strong></td>
<td>A summary of CalSTRS history and next steps as we participate in the transition to a low-carbon economy.</td>
</tr>
</tbody>
</table>
Environmental Strategies at CalSTRS

CalSTRS understands Environmental, Social and Governance (ESG) issues have the potential to affect our investment portfolio performance in both positive and negative ways. As fiduciaries of the California State Teachers’ Retirement System, we integrate ESG considerations into each of our asset class strategies. We also directly engage with portfolio companies, submit and support shareholder proposals and vote corporate proxies to help manage and mitigate ESG risks.

Response to the Low-Carbon Economic Transition

We believe the way the world responds to climate change can materially impact our investment portfolio. Understanding the impacts of the low-carbon transition is, therefore, a priority for us. In October 2019, the Teachers’ Retirement Board initiated the implementation of a Low-Carbon Transition Work Plan, which will build on more than 15 years of work in climate-risk mitigation strategies.

Some of our current activities include:

- **Supporting Carbon Pricing:** In May 2019, the CalSTRS Investment Committee approved a new policy on carbon pricing that is in alignment with the Paris Climate Accord goals. We believe that carbon pricing can play a role in reducing emissions while also driving consumer behavior, business strategies and investment flows.

- **Creating CalSTRS Low Carbon Index:** In fiscal year 2018–19, we invested $1 billion in non-U.S. developed markets, in addition to our initial $1.3 billion investment in the U.S. market in July 2017.

- **Playing a Leadership Role in the Climate Action 100+:** We work with more than 370 global investors who collectively represent $35 trillion in assets under management to engage over 100 of the world’s most significant greenhouse gas emitters to align their goals with the Paris Climate Accord. As a result of this coalition:
  - American Electric Power, the largest U.S. utility company, set a goal to reduce carbon emissions by 60 percent by 2030 and 80 percent by 2050.
  - Glencore, the world’s largest mining company, agreed to cap global coal production and reduce global emissions.
  - Maersk, the world’s largest ocean shipping company, committed to net zero carbon emissions by 2050.
  - Shell committed to reduce emissions across its entire value chain.
  - Duke Energy updated their climate strategy with a new goal of net-zero carbon emissions from electric generation by 2050.

Investments in Green Buildings

Green buildings are designed, built, renovated, operated or reused in an ecologically conscious and resource-efficient manner. Nearly 90 percent of CalSTRS’ directly controlled office buildings are Energy Star certified and have achieved LEED certification. Our Real Estate Program seeks investments in buildings that conserve energy and water as well as implement recycling and waste disposal methods.

Investments in Green Bonds

Green bonds are securities that offer competitive returns with the added advantage of investing in projects that benefit the environment. As of September 2019, CalSTRS holds $283.5 million in green bonds. Since 2009, CalSTRS has purchased over $700 million green bonds with more than 50 different issuers.
Green Initiative Task Force Team
At least one member from each asset class is part of the CalSTRS Green Team, which meets regularly to:

- Discuss sustainability strategies.
- Research environmentally focused investment opportunities.
- Integrate environmental risk factors into the procurement process and ensure ongoing risk management efforts with external managers.
- Network and collaborate with peers on sustainability issues.
- Coordinate staff education on risk management and investment opportunities related to green energy.

Green Initiative Task Force Report
The Green Initiative Task Force Report details our investment activities related to environmental risk management, company engagement efforts and the integration of environmental risk factors into our investment strategies. The Green Team conducts research and provides reports on topics such as climate change, water risk, methane emissions, clean energy, resource efficiency and carbon pricing.

Sustainability at CalSTRS
Organizational sustainability is fundamental to the services CalSTRS provides and is integrated into our culture. We strive to apply diligence, care and fiduciary responsibility to our decisions and recommendations to ensure we’re a sustainable organization for our current and future members and their beneficiaries. For example, our headquarters building is energy efficient and was designed to reduce our impact on the environment. CalSTRS also:

- Sets targets for building energy and water use, waste diversion, greenhouse gas emissions and alternate transportation.
- Encourages alternate transportation for our employees and contractors to reduce traffic congestion and greenhouse gas emissions.
- Commits to procuring environmentally focused products.
- Operates under a LEED Platinum certification for Existing Building Operations and Maintenance.
How CalSTRS Is Participating in the Transition to a Low-Carbon Economy

The latest report from the Intergovernmental Panel on Climate Change (IPCC) underscores the impact of human activities on greenhouse gas emissions and global warming. The consequences of climate change are documented through more extreme weather, rising sea levels and diminished Arctic ice. California’s pattern of devastating droughts and fires brings the consequences closer to home for CalSTRS.

The IPCC report recommends limiting the increase in global temperatures to 1.5 degrees Celsius above pre-industrial levels. According to key findings, avoiding the worst impacts of climate change will ease the pathway to sustainable development and a more equitable society. Efforts to reduce emissions are already underway. The Paris Agreement, ratified by 184 nations in November 2016, mobilized world leaders in a global endeavor to transition to a lower carbon economy.

The links between climate change, business and investment are becoming increasingly evident. Climate change presents both:

- Physical risks: Risks that arise from the physical impacts of a changing climate.
- Transition risks: Risks that arise from the transition to a low-carbon economy, such as policy shifts and technological transformations.

Significant investment opportunities also exist in helping the global economy both mitigate and adapt to a changing climate.

As a global institutional investor with a focus on the long term, CalSTRS recognizes that climate change presents a material and existential risk to society and the economy. We are committed to influencing public policies, engaging with the companies in our portfolio and investing to promote an orderly transition to a low-carbon economy that benefits all.

CalSTRS Board Approves Low-Carbon Transition Investment Policy

In May 2019, the CalSTRS Investment Committee took action to approve new policy language:

“We believe that how the world responds to the risks associated with climate change, as detailed by peer reviewed scientific reports, including those from the Intergovernmental Panel on Climate Change (IPCC), will materially impact the value of our investment portfolio. CalSTRS recognizes that public policies, technological advances and physical impacts associated with concerns about climate change are already driving the transition to a lower carbon economy. As a diversified global investor, we need to understand the transition’s potential impacts and consider actions we can take to mitigate risk and identify related investment opportunities.”
CalSTRS Engages Policy Makers, Financial Markets and Companies

2014
Signatory to the Global Investor Statement on Climate Change

2015
Supported the Paris Pledge for Action to welcome Paris Agreement

2015
Participant in UN-led Business and Investor Working Group on Carbon Pricing

2016
Engage Global Equity managers as to whether they consider carbon profile in decision making

2017
Signatory to the Global Investor Letter to G7 Governments calling for climate change risk management

2019
CalSTRS Investment Committee approves policy on carbon pricing consistent with Paris Agreement

CalSTRS Supports Carbon Pricing

The CalSTRS Investment Committee has approved policy language regarding its support for a stable and clear carbon-pricing framework that aligns with the Paris Agreement’s goals of reducing global emissions. We believe it is important for global policymakers to hear this message from one of the world’s largest pension funds. We recognize that finding politically acceptable ways to price pollution will drive consumer behavior, business strategy and investment flows. We also recognize the imperative that the low-carbon transition avoids exacerbating economic inequality and related geopolitical risks.
Playing a Leadership Role in the Climate Action 100+

CalSTRS works with more than 340 global investors who collectively manage $33 trillion in assets under management to engage over 100 of the world’s most significant greenhouse gas emitters to align their goals with the Paris Agreement. As a result of this coalition, to date:

- **American Electric Power**, the largest U.S. utility company, set a goal to reduce carbon emissions by 60% by 2030 and 80% by 2050.
- **Glencore**, the world’s largest mining company, agreed to cap global coal production and reduce global emissions.
- **Maersk**, the world’s largest ocean shipping company, committed to net zero carbon emissions by 2050.
- **Shell**, with operations in 70 countries and territories worldwide, committed to reduce emissions across its entire value chain.
- **Duke Energy**, a large U.S. utility company, plans a 50% reduction in carbon emissions by 2030 and net zero emissions generation by 2050.

Participating in the Task Force on Climate-Related Financial Disclosures (TCFD)

CalSTRS is engaging companies to adopt the recommendations of the TCFD to increase the availability of consistent climate-related financial risk disclosures. Better information helps investors price climate risk and reward climate innovation. There is significant positive momentum around the world with a growing number of companies reporting in alignment with the TCFD.

Identifying Low-Carbon Investment Strategies

- **Creating the CalSTRS Low-Carbon Index:** We have invested more than $2 billion in a public equity low-carbon index that is projected to have approximately 70% lower exposure to carbon emissions than a non-low-carbon index.

- **Investing nearly $2 billion in sustainability focused strategies across the portfolio:** Consistent with CalSTRS’ Green Initiative Task Force Annual Report, we have increased our investments with partners that are experts in analyzing how sustainability-related trends, like the low-carbon transition, create investment risks and opportunities. For example, we have approximately $288 million invested in green bonds and CalSTRS Inflation Sensitive asset class has $364 million invested in solar, wind and other renewable power generation and LEED-certified assets. Our Private Equity group has a Clean Energy Portfolio with over $500 million invested and in Real Estate, nearly 90% of CalSTRS’ directly controlled office buildings are Energy Star certified and have achieved LEED certification.

- **Excluding global companies deriving 50% or more of their revenues from the sale of thermal coal.**
Next Steps for CalSTRS

The Teachers’ Retirement Board has determined that the low-carbon transition is an urgent priority. CalSTRS is focused on:

- **Building consensus** among the board and staff about how the low-carbon transition will impact CalSTRS and its investment portfolio.

- **Analyzing the “transition readiness”** of our portfolios to deepen our understanding of both physical climate-related issues and transition issues across different asset classes, geographies and strategies.

- **Expanding our stewardship activities** through public policy engagement, corporate engagement and proxy voting to support an orderly transition aligned with the Paris Agreement and the findings of the IPCC. This recognizes our considerable influence as a large investor to influence public policy and corporate action.

- **Continuing our commitment** to reporting and communicating with our partners, peers, stakeholders, legislators.
Your Social Security retirement or disability benefits can be reduced

The Windfall Elimination Provision can affect how we calculate your retirement or disability benefit. If you work for an employer who doesn’t withhold Social Security taxes from your salary, such as a government agency or an employer in another country, any retirement or disability pension you get from that work can reduce your Social Security benefits.

When your benefits can be affected

This provision can affect you when you earn a retirement or disability pension from an employer who didn’t withhold Social Security taxes and you qualify for Social Security retirement or disability benefits from work in other jobs for which you did pay taxes.

The Windfall Elimination Provision can apply if:

• You reached 62 after 1985; or
• You became disabled after 1985; and
• You first became eligible for a monthly pension based on work where you didn’t pay Social Security taxes after 1985. This rule applies even if you’re still working.

This provision also affects Social Security benefits for people who performed federal service under the Civil Service Retirement System (CSRS) after 1956. We won’t reduce your Social Security benefit amounts if you only performed federal service under a system such as the Federal Employees’ Retirement System (FERS). Social Security taxes are withheld for workers under FERS.

How it works

Social Security benefits are intended to replace only some of a worker’s pre-retirement earnings.

We base your Social Security benefit on your average monthly earnings adjusted for average wage growth. We separate your average earnings into three amounts and multiply the amounts using three factors to compute your full Primary Insurance Amount (PIA). For example, for a worker who turns 62 in 2019, the first $926 of average monthly earnings is multiplied by 90 percent; earnings between $926 and $5,583 by 32 percent; and the balance by 15 percent. The sum of the three amounts equals the PIA which is then decreased or increased depending on whether the worker starts benefits before or after full retirement age (FRA). This formula produces the monthly payment amount.

When we apply this formula, the percentage of career average earnings paid to lower-paid workers is greater than higher-paid workers. For example, workers age 62 in 2019, with average earnings of $3,000 per month could receive a benefit at FRA of $1,497 (approximately 49 percent) of their pre-retirement earnings increased by applicable cost of living adjustments (COLAs). For a worker with average earnings of $8,000 per month, the benefit starting at FRA could be $2,686 (approximately 33 percent) plus COLAs. However, if either of these workers start benefits earlier, we’ll reduce their monthly benefit.

Why we use a different formula

Before 1983, people whose primary job wasn’t covered by Social Security had their Social Security benefits calculated as if they were long-term, low-wage workers. They had the advantage of receiving a Social Security benefit representing a higher percentage of their earnings, plus a pension from a job for which they didn’t pay Social Security taxes. Congress passed the Windfall Elimination Provision to remove that advantage.

Under the provision, we reduce the 90 percent factor in our formula and phase it in for workers who reached age 62 or became disabled between 1986 and 1989. For people who reach 62 or became disabled in 1990 or later, we reduce the 90 percent factor to as little as 40 percent.

Some exceptions

The Windfall Elimination Provision doesn’t apply if:

• You’re a federal worker first hired after December 31, 1983;
• You’re an employee of a non-profit organization who was first hired after December 31, 1983;
• Your only pension is for railroad employment;
• The only work you performed for which you didn’t pay Social Security taxes was before 1957; or
• You have 30 or more years of substantial earnings under Social Security.
The Windfall Elimination Provision doesn’t apply to survivors benefits. We may reduce spouses, widows, or widowers benefits because of another law. For more information, read Government Pension Offset (Publication No. 05-10007).

Social Security years of substantial earnings
If you have 30 or more years of substantial earnings, we don’t reduce the standard 90 percent factor in our formula. See the first table that lists substantial earnings for each year.

The second table shows the percentage used to reduce the 90 percent factor depending on the number of years of substantial earnings. If you have 21 to 29 years of substantial earnings, we reduce the 90 percent factor to between 45 and 85 percent. To see the maximum amount we could reduce your benefit, visit www.socialsecurity.gov/planners/retire/wep-chart.html.

A guarantee
The law protects you if you get a low pension. We won’t reduce your Social Security benefit by more than half of your pension for earnings after 1956 on which you didn’t pay Social Security taxes.

<table>
<thead>
<tr>
<th>Year</th>
<th>Substantial earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1937–1954</td>
<td>$900</td>
</tr>
<tr>
<td>1955–1958</td>
<td>$1,050</td>
</tr>
<tr>
<td>1959–1965</td>
<td>$1,200</td>
</tr>
<tr>
<td>1966–1967</td>
<td>$1,650</td>
</tr>
<tr>
<td>1968–1971</td>
<td>$1,950</td>
</tr>
<tr>
<td>1972</td>
<td>$2,250</td>
</tr>
<tr>
<td>1973</td>
<td>$2,700</td>
</tr>
<tr>
<td>1974</td>
<td>$3,300</td>
</tr>
<tr>
<td>1975</td>
<td>$3,525</td>
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<tr>
<td>1976</td>
<td>$3,825</td>
</tr>
<tr>
<td>1977</td>
<td>$4,125</td>
</tr>
<tr>
<td>1978</td>
<td>$4,425</td>
</tr>
<tr>
<td>1979</td>
<td>$4,725</td>
</tr>
<tr>
<td>1980</td>
<td>$5,100</td>
</tr>
<tr>
<td>1981</td>
<td>$5,550</td>
</tr>
<tr>
<td>1982</td>
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</tr>
<tr>
<td>1983</td>
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</tr>
<tr>
<td>1984</td>
<td>$7,050</td>
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<tr>
<td>1985</td>
<td>$7,425</td>
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<tr>
<td>1986</td>
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<tr>
<td>1987</td>
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<tr>
<td>1988</td>
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<td>1989</td>
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</tr>
<tr>
<td>1990</td>
<td>$9,525</td>
</tr>
<tr>
<td>1991</td>
<td>$9,900</td>
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<table>
<thead>
<tr>
<th>Year</th>
<th>Substantial earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992</td>
<td>$10,350</td>
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<tr>
<td>1993</td>
<td>$10,725</td>
</tr>
<tr>
<td>1994</td>
<td>$11,250</td>
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<tr>
<td>1995</td>
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<tr>
<td>1996</td>
<td>$11,625</td>
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<td>1997</td>
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<td>1999</td>
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<tr>
<td>2000</td>
<td>$14,175</td>
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<tr>
<td>2001</td>
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<tr>
<td>2002</td>
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<td>2003</td>
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<td>2006</td>
<td>$17,475</td>
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<tr>
<td>2008</td>
<td>$18,975</td>
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<td>2009–2011</td>
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<tr>
<td>2012</td>
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<tr>
<td>2013</td>
<td>$21,075</td>
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<tr>
<td>2014</td>
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<tr>
<td>2015–2016</td>
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<tr>
<td>2017</td>
<td>$23,625</td>
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<tr>
<td>2018</td>
<td>$23,850</td>
</tr>
<tr>
<td>2019</td>
<td>$24,675</td>
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</table>

<table>
<thead>
<tr>
<th>Years of substantial earnings</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 or more</td>
<td>90 percent</td>
</tr>
<tr>
<td>29</td>
<td>85 percent</td>
</tr>
<tr>
<td>28</td>
<td>80 percent</td>
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<tr>
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<td>75 percent</td>
</tr>
<tr>
<td>26</td>
<td>70 percent</td>
</tr>
<tr>
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</tr>
<tr>
<td>23</td>
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<tr>
<td>22</td>
<td>50 percent</td>
</tr>
<tr>
<td>21</td>
<td>45 percent</td>
</tr>
<tr>
<td>20 or less</td>
<td>40 percent</td>
</tr>
</tbody>
</table>

Contacting Social Security
The most convenient way to contact us anytime, anywhere is to visit www.socialsecurity.gov. There, you can: apply for benefits; open a my Social Security account, which you can use to review your Social Security Statement, verify your earnings, print a benefit verification letter, change your direct deposit information, request a replacement Medicare card, and get a replacement SSA-1099/1042S; obtain valuable information; find publications; get answers to frequently asked questions; and much more.

If you don’t have access to the internet, we offer many automated services by telephone, 24 hours a day, 7 days a week. Call us toll-free at 1-800-772-1213 or at our TTY number, 1-800-325-0778, if you’re deaf or hard of hearing.

If you need to speak to a person, we can answer your calls from 7 a.m. to 7 p.m., Monday through Friday. We ask for your patience during busy periods since you may experience a higher than usual rate of busy signals and longer hold times to speak to us. We look forward to serving you.
Government Pension Offset

A law that affects spouses and widows or widowers

If you receive a retirement or disability pension from a federal, state, or local government based on your own work for which you didn’t pay Social Security taxes, we may reduce your Social Security spouses or widows or widowers benefits. This fact sheet provides answers to questions you may have about the reduction.

How much will my Social Security benefits be reduced?

We’ll reduce your Social Security benefits by two-thirds of your government pension. In other words, if you get a monthly civil service pension of $600, two-thirds of that, or $400, must be deducted from your Social Security benefits. For example, if you’re eligible for a $500 spouses, widows, or widowers benefit from Social Security, you’ll get $100 a month from Social Security ($500 – $400 = $100). If two-thirds of your government pension is more than your Social Security benefit, your benefit could be reduced to zero.

If you take your government pension annuity in a lump sum, Social Security will calculate the reduction as if you chose to get monthly benefit payments from your government work.

Why will my Social Security benefits be reduced?

Benefits we pay to spouses, widows, and widowers are “dependent” benefits. Set up in the 1930s, these benefits were to compensate spouses who stayed home to raise a family and were financially dependent on the working spouse. It’s now common for both spouses to work, each earning their own Social Security retirement benefit. The law requires a person’s spouse, widow, or widower benefit to be offset by the dollar amount of their own retirement benefit.

For example, if a woman worked and earned her own $800 monthly Social Security benefit, but was also due a $500 spouse’s benefit on her husband’s record, we couldn’t pay that spouse’s benefit because her own benefit offsets it. Before enactment of the Government Pension Offset law, if that same woman was a government employee who didn’t pay into Social Security and earned an $800 government pension, there was no offset. We had to pay her a full spouse’s benefit and her full government pension.

If this person’s government work had been subject to Social Security taxes, we would reduce any spouse, widow, or widower benefit because of their own Social Security retirement benefit. The Government Pension Offset ensures that we calculate the benefits of government employees who don’t pay Social Security taxes the same as workers in the private sector who pay Social Security taxes.

When won’t my Social Security benefits be reduced?

Generally, we won’t reduce your Social Security benefits as a spouse, widow, or widower if you:

• Receive a government pension that’s not based on your earnings; or
• Are a federal (including Civil Service Offset), state, or local government employee and your government pension is from a job for which you paid Social Security taxes; and:
  —Your last day of employment (that your pension is based on) is before July 1, 2004; or
  —You filed for and were entitled to spouses, widows, or widowers benefits before April 1, 2004 (you may work your last day in Social Security covered employment at any time); or
  —You paid Social Security taxes on your earnings during the last 60 months of government service. (Under certain
conditions, we require fewer than 60 months for people whose last day of employment falls after June 30, 2004, and before March 2, 2009.)

There are other situations for which we won’t reduce your Social Security benefits as a spouse, widow, or widower; for example, if you:

- Are a federal employee who switched from the Civil Service Retirement System (CSRS) to the Federal Employees’ Retirement System (FERS) after December 31, 1987; and:
  — Your last day of service (that your pension is based on) is before July 1, 2004;  
  — You paid Social Security taxes on your earnings for 60 months or more during the period beginning January 1988 and ending with the first month of entitlement to benefits; or
  — You filed for and were entitled to spouses, widows, or widowers benefits before April 1, 2004 (you may work your last day in Social Security covered employment at any time).

- Received, or were eligible to receive, a government pension before December 1982 and meet all the requirements for Social Security spouse’s benefits in effect in January 1977; or

- Received, or were eligible to receive, a federal, state, or local government pension before July 1, 1983, and were receiving one-half support from your spouse.

**Note:** A Civil Service Offset employee is a federal employee, rehired after December 31, 1983, following a break in service of more than 365 days, with five years of prior CSRS coverage.

Can I still get Social Security benefits from my own work?

The offset applies only to Social Security benefits as a spouse, or widow, or widower. However, we may reduce your own benefits because of another provision. For more information, go online to read *Windfall Elimination Provision* (Publication No. 05-10045).

Contacting Social Security

The most convenient way to contact us anytime, anywhere is to visit [www.socialsecurity.gov](http://www.socialsecurity.gov). There, you can: apply for benefits; open a *my Social Security* account, which you can use to review your Social Security Statement, verify your earnings, print a benefit verification letter, change your direct deposit information, request a replacement Medicare card, and get a replacement SSA-1099/1042S; obtain valuable information; find publications; get answers to frequently asked questions; and much more.

If you don’t have access to the internet, we offer many automated services by telephone, 24 hours a day, 7 days a week. Call us toll-free at 1-800-772-1213 or at our TTY number, 1-800-325-0778, if you’re deaf or hard of hearing.

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What about Medicare?

Even if you don’t get benefit payments from your spouse’s work, you can still get Medicare at age 65 on your spouse’s record if you aren’t eligible for it on your own record.
Adult, Alternative, and Career Technical Education

Kristin Montoya, Chairperson
Colin Davis, Vice Chairperson
Dominic Rizzi, Secretary
Mike Patterson, Board Liaison
Patricia Rucker, Legislative Advocate
Cindy Heller, Consultant
Wendy Lockhart, Consultant

MAJOR POLICY – Immediate Action (2/3rd vote required)

none

MAJOR POLICY – First Reading

MAJOR POLICY – Second Reading

Pages 270-271
Adult Education

CTA believes:

1. That Adult Education in K-12 and Community Colleges should be a seamless pathway that articulates between both systems. The structure of the Adult Education system should include collaboration between groups to foster efficiency. Funding for Adult Education must include a dedicated adequate funding source. New funding must be used to restore, maintain and create programs for adults.

2. The purpose of Adult Education is to provide opportunities for adults with low skills to gain education and training to become career or college ready and also to provide programs for immigrants in citizenship, ESL, and workforce preparation.

3. Creating efficiency in both the K-12 and Community College systems when developing courses must not create a hierarchy that subsumes one under the other.

4. The employees must remain with their current employer. K-12 Adult Education should be increased to meet minimum requirements for continuation and upgrading of current programs and should reflect the need for funding parity between K-12 and Community Colleges.
5. Community Colleges should receive a basic level of support for Adult Education. Additionally, Community Colleges should receive a cost of living adjustment (COLA) in keeping with the COLA received for other programs offered by the Community Colleges.

6. Both segments shall be placed on a funding formula for the purpose of reaching a common funding level for like programs.

7. The COLA for Adult Education funding will be equal to that of the individual community college or K-12 district.

8. An annual growth factor will be included for the K-14 Adult Education programs to meet the needs of the community.

9. Up to 2% of the previous year's budget will be allowed on an application basis to initiate new programs. The ADA CAEP (California Adult Education Program) cap should be adjusted by the above 2% for each new program.

10. Any high school, unified or community college district may assume responsibility of providing adult education only by a mutual delineation of functions agreement. If the parties are unable to agree to a mutual delineation of functions agreement, the parties will agree to abide by a final and binding decision which shall be made by a representative of the State Conciliation Services. These decisions when applicable shall be part of the collective bargaining process as defined in SB 160. In the absence of an exclusive agent, in a district when the above issue surfaces, the appropriate teacher/faculty body shall be given the opportunity to meet and negotiate the impact of the decision.

11. Districts whose ADA CAEP cap is being audited and adjusted should be allowed to apply for additional ADA funding above the cap in order to meet the changing needs of a community.


Page 272-273

Career/Technical Education

(CTA would like to modify all instances of “Career/Technical” to remove the slash and become “Career Technical”)

CTA further believes:
1. A comprehensive career technical education program at the elementary level assists the classroom teacher in utilizing job-related activities which emphasize planning and construction to reinforce learning experiences related to English, science, mathematics, and social science and gives the student an awareness of and an orientation to the world of work.
2. The industrial arts and Career technical education programs in the elementary, middle school, junior high, and high school, and adult education segments provide the student the opportunity for exploration, development and understanding of the technical, consumer, occupational, organizational, managerial, social and cultural aspects of agriculture, industry and technology. The program also provides a link between abstract educational concepts and the practical use of basic occupational and technical skills.

3. The career/technical education components should represent a continuum starting in pre-K and extending through the post-secondary level to provide preparation, work experience and placement services and activities that will lead to meaningful and informed occupational choices and to the development of sufficient skills and knowledge for the student to enter and advance in a gainful, satisfying career. (VED: June 1980; ACT: January 2008, June 2014)

4. CTA believes that K-12 adult education programs and community colleges have a substantial role in providing a comprehensive program of college and career readiness that is available to all students. College and career readiness programs prepare students for postsecondary education and lead to meaningful and informed occupational choices.

Page 275
Collaborative Programs (K-12/Higher Education)

CTA believes secondary and adult school students have the right to adequate preparation for success in higher education through state-supported collaborative programs between the public schools and institutions of higher education. (CRE: December 1989)

Page 358
Career/Technical Education

CTA believes a meaningful educational program must include both academic and career/technical education programs that complement and strengthen each other. All students in the public school system should have access to career/technical education programs which include proper counseling and guidance services.

CTA believes that Career and Technical Education instructors who have been teaching a CTE course closely related to their Designated Subject Credential and are receiving Federal Perkins funds possess the competency to teach those CTE courses without the need for further industry experience or coursework in order to receive continued Federal Perkins funds.
The scope of career/technical education programs must include a systematic sequence of learning experiences which provide individuals with the necessary skills, knowledge and attitudes to attain entry level employment, occupational advancement, upgrading or career change. This scope includes job preparation, job exploration, and the continuation of general educational growth. The target population for career/technical education will be pre-high school graduates, high risk students, community college students, and continuing education students of all ages, including adults.

Career/technical education in its broadest sense includes career exploration, job training, work experience, certificate programs, and all basic skill proficiencies related to employment and the acquisition of employable skills, attitudes, and values. Job training/employment training is a component of career/technical education. Job training/employment training is defined as learning experiences designed to impart skills, knowledge and attitudes to properly prepare individuals for immediate employment.

**CTA believes that strong CTE programs include partnerships with local, regional and State industries. CTA also supports the expansion of pre-apprenticeship and apprenticeship programs that partner with local, regional and state labor councils that will lead to journey-level or equivalent career opportunities for our students.**

The primary responsibility for career/technical education programs should reside within the identified public education community. All ROC/ROP, adult school, and other career/technical education programs should be administered by appropriate pre-K-12 and community college districts.

**OTHER ITEMS FOR IMMEDIATE ACTION**

None

**REFERRALS TO THE BOARD OF DIRECTORS**

1. ACT requests a sub-committee of 6 members be convened to review the new Perkins regulations the CA State Board of Education will be approving at their Nov. 6th meeting that require public comment prior to the January State Council. The sub-committee will be working on CTA’s response to the new regulations.

2. CTA investigates updating Ed Code to reflect the defunding of “ROC/P” (Regional Occupational Centers/Programs) and replace with “CTE” (Career Technical Education) programs where applicable.
MATTERS PENDING

1. ACTE received approval to put together CTE tours for the CTA Board, one each in Northern and Southern California. The committee will be working on this in the coming months.

INFORMATIONAL ITEMS

1. Congratulations to ACTE Chair Kristin Montoya, who will be honored this weekend with an “Impact on Education” award by the Leon Owens Foundation.

2. ACTE spent time discussing the critical need for more teachers, especially CTE teachers. A recent article, “California rural schools struggling to hire teachers could get help from $9.4 million in grants: Grant will fund residency program that will bring new teachers to Visalia Unified.”, highlighted how additional funding could be used to address the teacher pipeline. [https://edsource.org/2019/california-rural-schools-struggling-to-hire-teachers-could-get-help-from-9-4-million-in-grants/619037](https://edsource.org/2019/california-rural-schools-struggling-to-hire-teachers-could-get-help-from-9-4-million-in-grants/619037)

3. CTA Board Liaison Mike Patterson presented an information item from the CTC’s September 2019 meeting regarding the findings of the Education Preparation Committee, Work Group on Career Educational Education. [https://www.ctc.ca.gov/docs/default-source/commission/agendas/2019-09/2019-09-5g.pdf?sfvrsn=2](https://www.ctc.ca.gov/docs/default-source/commission/agendas/2019-09/2019-09-5g.pdf?sfvrsn=2)

4. The CA Dept of Labor has a new commission on “The Future of Work”, whose mission is to take a deep look into what “work” looks like in the future and how we develop paths to educate people for that work. [https://labor.ca.gov/fowc/](https://labor.ca.gov/fowc/)

5. The National CTE conference “Career TECH Vision” will be in Anaheim this year Dec 4-7, 2019.

6. The Annual CITEA (California Industrial Technology Educators Association) conference will be March 20-21 at Palomar CC.

7. ACTE Secretary Dominic Rizzi announced he will be leaving State Council due to an expected new family addition in January 2020. We wish Dominic all the best in his new adventure as a father and appreciate all his work for the committee.

8. Laura Araujo-Salinas was elected as the new ACTE secretary.
MAJOR POLICY – Immediate Action (2/3rd Vote Required)

NONE

MAJOR POLICY – First Reading

NONE

MAJOR POLICY – Second Reading

Add new paragraph below the first paragraph of Proposition 98 Guarantee (p. 283) to read:

CTA believes the integrity of Proposition 98 must be maintained. Any Pre K-14 education adjacent programs or new student populations not already funded within Proposition 98, must be funded outside of Proposition 98 or Proposition 98 must be augmented and re-benched to accommodate the increased costs.

OTHER ITEMS FOR IMMEDIATE ACTION

A. NBI# 3/19-10

CTA will write policy opposing tax revenue being spent on banking fees that profit privately run banking institutions when that revenue could be recouped by using a public bank.

The committee recommends the NBI be declared moot.

Rationale: A public banking bill was passed by the legislature and signed into law during the most recent legislative session.

REFERRALS TO THE BOARD OF DIRECTORS

A. The committee refers the attached Long-Term Funding Public Education Plan Outline to the Board of Directors for implementation.

MATTERS PENDING

NONE

INFORMATIONAL ITEMS

1. FPE Chairperson Grant Schuster welcomed new committee members, alternates and visitors.
2. Board Liaison Erika Jones expressed her excitement in being a part of FPE and shared information about AB 1505, AB 1507, Schools and Communities First, and elections this weekend.

3. Dave Brown reviewed FPE positions on legislation over this past cycle.

4. Angela Su provided information on the history of school funding in California as well as an update on Schools and Communities First.
Long Term Funding Public Education Plan Outline

Introductory Narrative
In July 2018, the CTA Board charged the Public Education Funding Workgroup with development of “short and long-term education funding plans for Pre-K thru Higher Education that include advocacy, legislative action, and ballot initiatives.” The Public Education Funding Workgroup met from late 2018 through mid-2019 and created several recommendations for the CTA Board. The Board accepted these recommendations and referred them to the Financing Public Education (FPE) and Political Involvement (PIC) Committees for development.

This plan outline focuses on developing knowledge and organizational capacity among the membership base, identifying resources, and creating accountability structures necessary to achieve the “long-term” aspect of the Board’s charge.

Objective
• Build organizational knowledge and capacity to achieve the goal of California achieving per-pupil funding equal to national average by 2025 and equal to top 10 of the 50 states by 2030.

Initial Research
• Identify a ranking system that incorporates state cost-of-living factors (use Quality Counts-EdWeek).
• Quantify average and top 10 of 50 states targets by January 1, 2020.
  o Update the targets annually on August 1 of each year.
• Identify/create a process to fund and do research on potential revenue sources by January 1, 2020.
  o Update annually on August 1 of each year.
• Develop an organizational budget to achieve the above by January 1, 2020.
• Generate a timeline, benchmarks, and a means to measure progress toward the targets by March 1, 2020.
  o Update annually on August 1 of each year.
• Develop a menu of proposals of potential local, state, and federal revenue sources and the means to achieve them by June 1, 2020.
• Develop a menu of proposals of other operational savings that could be applied to generate additional funding for public education by June 1, 2020.
  o Closing selected state “tax expenditures” and/or “tax credits.”

Routine Communication
• Share an outline of the plan with FPE and PIC for adoption and include the plan in the FPE report to State Council in October 2019.
• FPE members share progress in relevant areas at subsequent Service Center Councils and solicit comment and commitments from attendees.
Long Term Funding Public Education Plan Outline

- FPE reports to State Council routinely include information on status of and progress on plan.
  - Legislation
    - Generating new revenue sources
    - Generating revenue through operational savings efforts (see above).
  - Local activities
    - Parcel taxes
    - Other
  - Initiatives
  - Other activities
    - Member education
    - Recruiting and training new cadre
- CTA BOD members will be well versed in this plan and discuss support of objectives at each Service Center Council meetings and Directorial meetings at State Councils.
- The CTA President makes an annual “State of Public Education Funding Report” at March State Council meetings that includes the status of and progress on the plan.
- CTA communications include regular updates on status of, progress on, and actions being taken to achieve plan.
  - CTA Educator
  - CTA website
  - CTA twitter
  - Produce and distribute FAQs and “What can I do?” to achieve objectives of plan for individual members

Building Organizational Capacity

- Budget for training and meeting of Tax Fairness and Economic Justice (TFEJ) cadre no later than January 1, 2020.
  - Built into CTA budget for FY 2020-2021.
- Create an organizing plan by January 2020 for TFEJ cadre to make progress toward objectives above for 2020 and subsequent years.
  - Include specific tasks, activities, objectives, and accountability measures supported by the plan and budget
    - Identify specific staff and governance support and accountability
  - Include training opportunities for current and prospective cadre
  - Include specific gathering/meeting opportunities for cadre
- Update Organizing plan in May of subsequent years and include it in FPE’s report for June State Council.
ASSESSMENT AND TESTING COMMITTEE

David Lollar, Chairperson
Marina Santos, Vice Chairperson
Jason Chrest, Recorder
Greg Abt, Board Liaison
Norma Sanchez, Consultant
Kelly Iwamoto, Consultant
Patricia Rucker, Legislative Advocate

MAJOR POLICY - Immediate Action (2/3rd vote required)
A. None.

MAJOR POLICY - Second Reading
A. None.

MAJOR POLICY - First Reading
A. None.

OTHER ITEMS FOR IMMEDIATE ACTION
A. None.

REFERRALS TO THE BOARD OF DIRECTORS
A. None.

MATTERS PENDING
A. None.

INFORMATIONAL ITEMS

1. Legislative Advocate, Patricia Rucker, provided a review on AST bills.

2. Board Liaison, Greg Abt, provided information on the Schools and Communities First Campaign.

3. In response to the referral from the CTA Board of Directors, the AST committee reviewed the inclusion of the California Alternative Assessment (CAA) in the Academic Indicator of the dashboard. Only 1% of students with significant disabilities take the CAA. Additionally, the methodology of the data from the CAA will not include scores from students who were unable to complete the assessment. AST approves the methodology adopted by the State Board of Education (SBE) because it decreases the number of districts and student groups identified for differentiated assistance.
4. In response to the referral from the CTA Board of Directors, the AST committee reviewed the changes of Alternative Schools data in the Academic Indicator of the dashboard. At the September State Board of Education (SBE) meeting, the SBE changed the status cut scores for alternative schools in the academic indicator. The SBE increased the Very Low cut score so more schools no longer fall under that category and would now be in the Low status level. AST approves this methodology as it would decrease the number of Alternative Schools falling into the very low status level.

5. In response to the referral from the CTA Board of Directors, the AST committee reviewed the changes to the Graduation Rate in the dashboard. At the September SBE meeting, the SBE raised the very low status requirement for the newly combined 4- and 5-year graduation rate methodology to less than 68% from less than 67%. CTA has a bargaining advisory “Supports for Schools and Districts Under a New Accountability System” that provides guidance and bargaining implications. This advisory provides relevant bargaining advice on this topic.

6. In response to the referral from the CTA Board of Directors, the AST committee reviewed information on the English Learner Progress Indicator (ELPI) in the dashboard. Since there was no action taken at the SBE September meeting, AST will continue to monitor the changes and provide feedback to the liaisons and SBE as the ELPI develops.

7. LCAP Redesign Template and Instructions Survey – The California Department of Education (CDE) has developed a survey to solicit feedback from stakeholders regarding both the draft Local Control and Accountability Plan Template (LCAP) and draft LCAP Template instructions. The survey will be available from October 9, 2019 through November 1, 2019. The survey may be accessed here: https://www.lcapredesign.org/. Please take the time to submit your response. They need educator input. The CDE will present the finalized draft LCAP Template (including instructions) to the SBE at its January 2020 meeting for adoption.
MAJOR POLICY – Immediate Action (2/3rd vote required)

None

MAJOR POLICY - First Reading

None

OTHER ITEMS FOR IMMEDIATE ACTION

None

REFERRALS TO THE BOARD OF DIRECTORS

None

MATTERS PENDING

NBI# 10/19-20 That CTA lobbyists will work with our legislators to ensure that School Psychologists have a 1 to 500-700 ratio per National Association of School Psychologist Standards.

INFORMATIONAL ITEMS

1. Toni Trigueiro reported out on the Governor’s veto of AB 1322 regarding creation of a school-based health unit at the state level. This bill would have expanded access to available federal funding for medically related services for all students. The proposed unit regarding school-based health would have improved collaboration between the State Department of Education and the State Department of Health Care Services, including Medical issues, and early screening and treatment. Toni discussed the continued controversy around disrupted learning. She encouraged members to read the Oregon Education Association report, “A Crisis of Disrupted Learning—Conditions in Our Schools and Recommended Solutions,” which is available on the OEA website (www.oregoned.org). The report recommends increased funding to schools in order to reduce class sizes and caseloads, provide high quality professional development and increase student support staff at the school site level.

2. The SPS Policy subcommittee is creation of an online SPS brochure regarding SPS services in schools. The subcommittee is working to update the current SPS brochure. The
subcommittee is also researching best practices. The SPS Legislative subcommittee had no legislation.

3. Nicole Piscionere, Liaison to the CA School Library Association reported that the Annual Conference is in February in the City of Industry. CSLA has worked with KQED on a teacher resource page regarding media literacy at CDE Media Literacy Resources (https://www.cde.ca.gov/ci/cr/ml/). The webpage includes lesson plans.

4. Kirsten Barnes, Liaison to the California Association of School Counselors, reported on the CASC Annual Conference held this October in Riverside. CTA had a table at the Conference. The ACLU is partnering with CASC to strengthen the number of student support personnel in schools and characterize such school-based services as a civil right. The information is available at www.aclusocal.org/edjustice.

5. Ken Johnson, Liaison to SARB, discussed the link between school attendance and support service. Students often don’t attend because of bullying or other trauma-based problems. SARB makes recommendations to the State Superintendent regarding programs that may affect student attendance.

6. Patty Taylor, CTA Pupil Services Coalition Liaison, explained the composition of the Pupil Services Coalition and their charge. The Coalition meets monthly in Sacramento at the CDE. They watch support service legislation and coordinate legislative support. The Coalition is also advocating the creation of a position at CDE that would be responsible for support services coordinating services across the state. The Coalition met with State Superintendent Tony Thurmond. The Coalition is presenting on November 7th at the ACSA summit in San Francisco.

7. CTA Board Member Sergio Martinez said that the Board approved the Disrupted Learning referral and there will be a general meeting of the Chairs and designated representatives of the Early Childhood Education, School Safety/School Management, Student Support services, Special Education and Civil Rights in Education Committees. Sergio also explained the procedures for absences from State Council. Board Member Martinez spoke to members about the signature-gathering campaign for the Schools and Communities First Initiative. He suggested that members use messaging around Reclaim, Recover, Refund, Repair and Restore and the initiative’s effect on school funding.

8. CTA Staff Consultants reported on CSU consideration of a fourth-year math requirement for CSU admission. The requirement has been opposed by CTA because current policy supports student access toward a broad course of study and there is a significant shortage of credentialed mathematics teacher. This requirement would likely affect African American, Latino and low-income students who do not have access to fourth-year math or quantitative reasoning classes at their public high school.
Data on school site and school district student support personnel is available on the CDE Dataquest website at [https://dq.cde.ca.gov/dataquest](https://dq.cde.ca.gov/dataquest) and then select staffing data and specify year, county or district, and pupil personnel staff.

The **Lucille Packard Foundation** provides ratios of Pupil Support Service Personnel by CA county at [www.kidsdata.org](http://www.kidsdata.org).
NEGOtiations Committee
Kyna Collins, Chairperson
John Havard, Vice-Chairperson
Andrea Clarke, Recorder
Jesse Aguilar, Board Liaison
Vern Gates, Consultant
Brian Breslin, Consultant
Seth Bramble, Legislative Advocate

Major Policy – Immediate Action (2/3rd Vote Required)
NONE

Major Policy – First Reading
NONE

Major Policy – Second Reading
NONE

Other Items for Immediate Action
NBI 10/19-1: CTA shall refer to the appropriate committee (could be an ad hoc committee) the task of reviewing and revising our current charter school policy.

The committee recommends approval of this NBI. The committee began this process with our morning subcommittee meetings.

Referrals to the Board of Directors
NONE

Matters Pending
NBI 10/19-12: CTA will explore actions to address the inequity of access to parents during disputed negotiations. Districts are able to send emails to parents giving their side of the negotiations meanwhile the local is dependent on works of mouth, social media, flyers.

Informational Items

1. Seth Bramble, Legislative Advocate, provided the committee with an overview of the status of the bills the committee took positions on during the last legislative cycle. Congratulations to the committee for their efforts in the passage of AB 1505 and AB 1507. Our work has just begun.
2. CTA Board Liaison Jesse Aguilar explained the agricultural and small business exemptions in the Schools and Communities First initiative.
MAJOR POLICY – Immediate Action (2/3rd vote required)
NONE

MAJOR POLICY – First Reading
NONE

MAJOR POLICY – Second Reading
NONE

OTHER ITEMS FOR IMMEDIATE ACTION
NONE

MATTERS PENDING
NONE

INFORMATIONAL ITEMS

1. The SEC Committee heard from C4OB staff, Ann Swinburn and UTLA staff, AV LeClair, about the *State of Denial: Charter Schools and Special Education Students*. The full report can be found here: [https://www.cta.org/StateofDenial](https://www.cta.org/StateofDenial). The committee found it important to note that the state of California has one of the lowest percentages of identified students with disabilities in the nation. Interested educators can find more information about that at: [https://www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2012/01/24/state-special-education-rates-vary-widely](https://www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2012/01/24/state-special-education-rates-vary-widely)

2. Chair, Robbie Kreitz: The committee received an informal training in committee protocols, policies, and procedures. Robbie shared that CTA has signed on to a letter that supports additional federal funding for Special Education. Robbie highlighted the Special Education Resources book from IPD, which can be found on the IPD page of Leader Resources. The cover is attached in this report.

3. Vice-Chair, Stacy Williams: There is a local Special Education symposium in San Diego coming up.
4. Board Liaison, Angela Normand: Angela reaffirmed the importance of Schools and Communities First and making sure that everyone is on board to work on behalf of our most disenfranchised students and communities.

5. Legislative Advocate, Isabelle Garcia: Mental health is a big issue coming up in the legislature. She reviewed a summary of last year’s legislation.

6. Consultant Karen Taylor: In response to the referral from the CTA Board of Directors, the SEC committee reviewed the inclusion of the California Alternative Assessment (CAA) in the Dashboard. Only 1% of students with significant disabilities take the CAA. The use of the data from the CAA will not include scores from students who were unable to complete the assessment. We approve the methodology adopted by the SBE because overall decreases the number of districts and students groups identified for differentiated assistance. See attached flyer for additional guidance on the SBAC and students with disabilities.

7. The Committee received reports from the liaisons:

   **Organization for Special Educators (CARS+), Alan Rawlins:** CARS+ conferences have a wide variety of workshops on Special Education topics that are helpful for all educators.

   **Advisory Commission of Special Education (ACSE), Rebekah Acord and Kelly Connell Sandler:** DID YOU KNOW?: It is National Disability Employment Awareness Month- Unemployment rate for people with disabilities is 70% for people who have been identified as Blind/Visually Impaired, Deaf/Hard of Hearing among ID’d population most negatively affected.

   Trabuco Hills in Saddleback Unified was awarded Special Olympics National Honors later for its inclusion program.

   **California Association of School Psychologists, Josie Malik:** CASP is in the beginning stages of trying to get a legislator on board to write a bill that would bring CEU’s (Continuing Education Units) back into the PPS credentialing process. They believe that all PPS credential holders need to be better trained and better prepared to handle and any and all issues they are confronted with. They believe that many PPS’ are not getting the training necessary to be up-to-date in their respective fields for whatever reason. CASP is very aware that they will need to tread carefully so as not to alienate stakeholders such as CTA who was instrumental in having them taken out of the credentialing process many years ago.

   AB 1651 – Was signed into law by Governor Newsom on September 20. The “Licensed educational psychologists: supervision of associates and trainees” bill by Medina will allow LEPS to supervise Board of Behavioral Sciences (BBS) associates (interns) while they offer educationally related mental health services in schools.

   AB 819 by Assemblywoman Christy Smith (Dynamic Interventions) a CASP sponsored bill is the working stages. This bill would fund emergency mental health funds to students impacted by natural disasters and/or human caused traumatic events. This would entail calling in mental health professionals from surrounding districts to come in and support students and staff.
California Community of Practice on Secondary Transition, Ed Amundson: CCPST had a training of trainers on transition. People should call their workability coordinator to find out more.
October 23, 2019

The Honorable Richard Shelby, Chair  
U.S. Senate Committee on Appropriations  
United States Capitol, Room S-128  
Washington, D.C. 20510

The Honorable Patrick Leahy, Vice Chair  
U.S. Senate Committee on Appropriations  
United States Capitol, Room S-128  
Washington, D.C. 20510

Re: Support House Version: IDEA Part B Funding Increase

Dear Mr. Shelby and Mr. Leahy:

On behalf of the statewide organizations represented on this letter, we are writing to express our support for the House spending plan for Individuals with Disabilities Education Act (IDEA) funding levels. The House has proposed to increase IDEA Part B State Grants education spending in fiscal year 2020 by $1 billion, a critical increase to attempt to keep up with the spending for students with disabilities nationwide.

In California, school districts have increased their local resources spending on students with disabilities by 83% while federal funds have increased by only 2% over the last decade. Our nation’s public schools are sinking beneath the disproportionate weight they carry to fund requirements of the IDEA, and these additional resources can help save them.

More than forty years ago, Congress promised to pay 40% of the new mandates required when IDEA was enacted. That has never happened. In fact, during the past three fiscal years, the federal apportionment for IDEA in California has represented 9% of the costs of IDEA mandates. California alone spent more last year on special education services than was appropriated in the entire 2019 federal budget for IDEA—Congress must do more.
While we write today on behalf of California’s students with disabilities, these funds are critical to the education of students nationwide. We respectfully call on Congress to approve the House’s $1 billion increase of IDEA Part B State Grants spending.

Sincerely,

Adonai Mack, Senior Director of Federal Relations
Association of California School Administrators

Elizabeth Esquivel, Senior Director of Policy and Governance
California Association of School Business Officials

Erika K. Hoffman, Legislative Advocate
California School Boards Association

Steve D. Ward, Legislative Analyst & Government Relations
California School Funding Coalition

Isabelle Garcia, Legislative Advocate
California Teachers Association

Brian Lewis, CEO
California Speech-Language-Hearing Association

David Toston, Chair
Coalition for Adequate Funding for Special Education

Susan Coston, Chair
SELPA Administrators of California

cc: The Honorable Dianne Feinstein, U.S. Senator
The Honorable Kamala Harris, U.S. Senator
The Honorable Roy Blunt, Chair, U.S. Senate Committee on Appropriations, Labor, Health and Human Services, Education, and Related Agencies
The Honorable Patty Murray, Ranking Member, U.S. Senate Committee on Appropriations, Labor, Health and Human Services, Education, and Related Agencies
The Honorable Chris Van Hollen, Sponsor of S. 866, the IDEA Full Funding Act
SPECIAL EDUCATION

RESOURCES

IEP Rights & Responsibilities & Behavioral Supports for Students with IEPs

Instruction & Professional Development

California Teachers Association

2019-2020 Edition

www.cta.org/ipd
You have a right to...

Choose "designated supports" for any child that might need that support on the assessment. Parents can also ask for a designated support. Students do not need a 504 or IEP for universal tools and designated supports.

Make a decision on an IEP that best suits the child's needs. This means that if the IEP team decides the alternate assessment is the best option for that child, the district cannot make you change that later if they are concerned about the high numbers of students taking the alternate assessment.

The Smarter Balanced assessment uses the principles of Universal Design for Learning (UDL) within the assessment. UDL is key in the design of SBAC because this means that ANY approved supports used by students on the Smarter Balanced assessment WILL NOT change the construct for students.

This has eliminated the need for an alternate assessment for the majority of students with IEPs in California.

Additionally, accommodations and universal supports are available to all students based on varying factors and degrees, including but not limited to teacher/parent decision, IEP team decisions, and in the case of the universal supports, access for all students.

Supports for Students with Disabilities on the SBAC

Accommodations (A) must be permitted on CAASPP tests to all eligible students if specified in the student’s IEP or Section 504 plan.

Designated supports are available to all students when determined for use by an educator or team of educators (with parent/guardian and student input, as appropriate) or specified in the student’s individualized education program (IEP) or Section 504 plan.

Universal tools (U) are available to all students on the basis of student preference and selection.

UDAs can be EMBEDDED or NON-EMBEDDED. The use of UDAs DOES NOT invalidate test scores or change the nature of the assessment.
Is there a 1% cap on how many students in a district can take the alternate assessment?

**NO.**

There is a statewide cap only. LEAs are required to notify the state that they are above the 1% CAP before they finish their testing. This advance notice allows the state educational agency to ask for a federal waiver if they anticipate going over the 1% cap.

**The Bottom Line:**

The IEP team makes the decision on what is most suitable for each child. Statewide caps do not affect IEP team decisions.

If you are asked to change an IEP based on this cap, notify your site rep and share this memo with them. You can also find more information at:

http://www.cde.ca.gov/ta/tg/ai/caasppmatrix1.asp

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**Want to Know More?**

**Where do I find information on the SBAC supports?**

The Matrix One is the California State Board of Education approved accessibility resources document for CAASPP testing. The Matrix One should be used in conjunction with the Smarter Balanced Usability, Accessibility and Accommodations Guidelines, a reference to obtain details on the recommended use of each of the resources.

http://www.cde.ca.gov/ta/tg/ai/caasppmatrix1.asp

**How do I make a request for a support?**

Should the student require an accessible resource that is not listed on Matrix One, use the unlisted resources request form in the Test Operations Management System and view the Requesting an Unlisted Resource Tutorial on how to make a request.


**What if my students begins a test without the required accessibility resources?**

The test administrator should inform the test site coordinator to complete a Security and Test Administration Incident Reporting System (STAIRS) report. Then, the test site coordinator may file an appeal to reset the test. When approved, the test site coordinator needs to enter the appropriate resources.

STAIRS report Link: http://www.caaspp.org/stairs/

**Are there video tutorials I can watch to learn more?**

Video tutorials are available to preview the embedded designated supports and accommodations and can be found at the Embedded Universal Tools, Designated Supports, and Accommodations Video Tutorials Web page. For other accessibility resources, please visit CAASPP Student Accessibility Resources and Test Settings Web page and CDE 2019-20 CA Student Assessment Accessibility Web page at http://www.caaspp.org/training/caaspp/uaag.html.

**Are scores from the CAA included on the Dashboard?**

In September 2019, the SBE approved the use of the CAA to be included in the Dashboard. This is mandated by federal and state accountability requirements. The use of the data from the CAA will not include scores from students who were unable to complete the assessment. The methodology adopted by the SBE overall decreases the number of districts and students groups identified for differentiated assistance.

Updated October, 2019
ABSTRACT

Charter schools in San Diego, Los Angeles, and Oakland enroll, on average, fewer students with disabilities than schools that are operated by San Diego Unified School District (SDUSD), Los Angeles Unified School District (LAUSD), and Oakland Unified School District (OUSD). In addition, charter schools in these three districts enroll fewer students with the most severe disabilities—who generally require the greatest resources to serve—than do district schools. This enrollment disparity produces a disproportionate gross fiscal impact for these three school districts because special education is funded on a per-pupil basis, rather than based on need.

The full report can be found at http://www.cta.org/StateOfDenial

INTRODUCTION

Public school district officials and advocates for students with disabilities have long alleged that charter schools do not enroll students with disabilities at levels comparable to those of district schools—a claim that has been borne out by several recent studies.¹

For the first time, our analysis quantifies the extent of this disparity in special education student enrollment between school districts and the charter schools they authorize in three California school districts: San Diego Unified School District (SDUSD), Los Angeles Unified School District (LAUSD), and Oakland Unified School District (OUSD). We found that across the three districts in the 2016–17 academic year, on average students with disabilities made up only 11.01 percent of the enrollment in charter schools, while comprising 14.27 percent of enrollment in district schools.

Further, although districts and advocates for students with disabilities have long observed that charter schools enroll students with disability categories that are less severe—and therefore less costly to serve—than do public school districts, very little research has been done to assess to what extent this might be true. Our analysis found that of those students enrolled, and when compared to enrollment in district schools in their authorizing school district, charter schools were serving a significantly smaller share of students with the most severe disabilities, including a persistent under-enrollment of students with autism, intellectual disabilities, multiple disabilities, and orthopedic impairments.

(continued)
Finally, in California, where special education funding is calculated on a per pupil basis—with no allowance for how many students with disabilities are enrolled, nor for the severity of their disabilities—California school districts potentially carry a significant disproportionate cost of providing mandated services to students with disabilities due to these enrollment disparities. We estimated, for the first time, the gross fiscal impact of these disparities on SDUSD, LAUSD, and OUSD and found that they are significant—totaling between $64.52 million and $97.19 million at the three districts combined. (See the full report for a detailed discussion of methodology.)

ENROLLMENT DISPARITIES OF SPECIAL EDUCATION STUDENTS

Our analysis of special education data for academic year 2017 found that charter schools as a group in San Diego, Los Angeles, and Oakland enrolled a significantly smaller share of students with disabilities than did district schools (11.01% vs. 14.27%).

<table>
<thead>
<tr>
<th>Average Percentage Enrolled Students With Disabilities: SDUSD, LAUSD &amp; OUSD Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter Schools</td>
</tr>
<tr>
<td>11.01%</td>
</tr>
</tbody>
</table>

Our analysis also found that charter schools in each district enrolled students with disabilities at significantly lower rates overall than district schools. This enrollment disproportionality was greatest in Oakland where charter schools enrolled students with disabilities at roughly half the rate of district-run schools (7.67% vs 13.58%). In Los Angeles, the average enrollment disparity between charter schools and district schools was slightly smaller, yet still significant (11.11% vs 14.16%). Finally, in San Diego, charter schools enrolled a smaller share of students with disabilities (12.96% vs 15.07%), albeit not at a statistically significant lower rate.

<table>
<thead>
<tr>
<th>Average Percentage Enrolled Students With Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDUSD</td>
</tr>
<tr>
<td>12.96%</td>
</tr>
<tr>
<td>11.11%</td>
</tr>
</tbody>
</table>
SPECIAL EDUCATION ENROLLMENT IN CHARTER SCHOOL CHAINS & STAND-ALONE SCHOOLS

While our analysis was focused on comparing charter school enrollment to public schools in their authorizing school district, the datasets we obtained also allowed us to look at enrollment of students with disabilities in a number of Charter Management Organizations (CMOs)—or chains of charter schools—around the state. What we found was that while 12.11 percent of statewide California students had an identifiable disability, and between 13 percent and 15 percent of the cohort school districts students did, many of the CMOs we analyzed had a calculated enrollment of students with disabilities below 10 percent.

Aspire Public Schools—a statewide charter school chain with total student enrollment over 14,000, and with schools in two of three cohort districts—enrolled only 8.61 percent students with disabilities. KIPP Charter Schools, Inspire Charter Schools, and Rocketship Public Schools all enrolled more than 5,000 students in multiple districts across the state, yet had special-needs enrollment below 10 percent. In fact, of the largest charter school chains, Inspire (7.05 percent) and Rocketship (7.34 percent) enrolled among the lowest percentage of students with disabilities across the three authorizing districts.

Local Los Angeles chains Celerity Education Group and the New Designs Education Group enrolled less than 10 percent students with disabilities—with New Designs particularly low at 6.86 percent. In San Diego, only 8.94 percent of students at Albert Einstein Academies chain had disabilities. In Oakland, American Indian Model Schools’ three schools enrolled less than three percent students with disabilities—the lowest of all the charter school chains we analyzed.

This under-enrollment of less than ten percent students was not limited to charter school chains: it was also persistent in stand-alone charter schools that are unaffiliated with any chain. Some charter schools on the list have both a very large reach and a long history, like the Vaughn Next Century...
Learning Center in Los Angeles, one of California's first charter schools, which enrolled nearly 3,000 students in 2017, of whom only 6.68 percent were students with disabilities—well under half the percentage enrolled in LAUSD schools. Similarly, the Preuss School in San Diego—which received its charter authorization in 1999—enrolled only 3.68 percent students with disabilities.

<table>
<thead>
<tr>
<th>Charter Network</th>
<th>Total Student Enrollment</th>
<th>%SWD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goethe International Charter (LAUSD)</td>
<td>434</td>
<td>7.14%</td>
</tr>
<tr>
<td>Granada Hills Charter High (LAUSD)</td>
<td>4,662</td>
<td>7.70%</td>
</tr>
<tr>
<td>Iftin Charter (SDUSD)</td>
<td>423</td>
<td>4.02%</td>
</tr>
<tr>
<td>Larchmont Charter (LAUSD)</td>
<td>1,432</td>
<td>9.50%</td>
</tr>
<tr>
<td>Montague Charter Academy (LAUSD)</td>
<td>898</td>
<td>8.24%</td>
</tr>
<tr>
<td>Oakland Military Institute, College Preparatory Academy (OUSD)</td>
<td>683</td>
<td>7.17%</td>
</tr>
<tr>
<td>Oakland School for the Arts (OUSD)</td>
<td>779</td>
<td>8.34%</td>
</tr>
<tr>
<td>Palisades Charter High (LAUSD)</td>
<td>2,982</td>
<td>8.99%</td>
</tr>
<tr>
<td>Port of Los Angeles High (LAUSD)</td>
<td>979</td>
<td>9.60%</td>
</tr>
<tr>
<td>Preuss School UCSD (SDUSD)</td>
<td>816</td>
<td>3.68%</td>
</tr>
<tr>
<td>The O’Farrell Charter (SDUSD)</td>
<td>1,689</td>
<td>9.30%</td>
</tr>
<tr>
<td>Urban Discovery Academy Charter (SDUSD)</td>
<td>485</td>
<td>8.66%</td>
</tr>
<tr>
<td>Vaughn Next Century Learning Center (LAUSD)</td>
<td>2,906</td>
<td>6.68%</td>
</tr>
<tr>
<td>Vista Charter Middle (LAUSD)</td>
<td>415</td>
<td>6.99%</td>
</tr>
</tbody>
</table>

ENROLLMENT DISPARITIES OF STUDENTS WITH DISABILITIES MOST LIKELY TO BE SEVERE

Because general enrollment only tells part of the story about whether charter schools are meeting their obligations to serve special education students, we also analyzed special education data that relates to the severity of disability for students in charter schools, as well as in their authorizer districts. What we found is that in Los Angeles, Oakland, and San Diego, charter schools under-enroll students with disabilities that generally require greater supports and more expensive accommodations, when compared to schools in their authorizing school district.

In fact, within each district we analyzed, charter schools routinely enrolled students with intellectual disabilities, students on the autism spectrum, and students with an orthopedic impairment—all categories that often require greater supports and more expensive accommodations—at lower percentages than their authorizing districts. The result was, of course, that these students with the highest needs were concentrated in district schools.

Conversely, our analysis shows that the students with disabilities who were enrolled in charter schools were concentrated in categories considered less severe than those enrolled in district schools. Charter schools in all three districts studied revealed a relative surfeit of students in the Specific Learning Disability and Other Health Impairment categories defined by the Individuals with Disabilities Education
Act, both overall considered to be mild to moderate in severity, and less expensive to serve. (See Appendix B of the full report for a description of the disability categories analyzed.)

**LAUSD**

In LAUSD, we found that students with an intellectual disability, an orthopedic impairment, or a visual impairment were enrolled in charter schools at roughly a quarter of the rate at which they were enrolled in district-run Los Angeles Unified schools. For students on the autism spectrum, there was a nearly eight percentage point difference in the average enrollment as a percentage of special education students between the charter schools and district schools.

<table>
<thead>
<tr>
<th>Disability</th>
<th>LAUSD</th>
<th>Charter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intellectual Disability</td>
<td>20.00</td>
<td>18.00</td>
</tr>
<tr>
<td>Orthopedic Impairment</td>
<td>18.00</td>
<td>16.00</td>
</tr>
<tr>
<td>Autism</td>
<td>16.00</td>
<td>14.00</td>
</tr>
</tbody>
</table>

**OUSD**

Oakland charter schools enrolled students with autism and students with intellectual disabilities at less than half the average rate of district schools. Notably, students with an orthopedic impairment and those who were identified as deaf were not enrolled in any charter school within Oakland during the 2017 academic school year.

**SDUSD**

In San Diego, we found that students on the autism spectrum made up a smaller share of the special education enrollment within charter schools compared to district schools by more than six percentage points. Students with an intellectual disability made up more than three times the average share of special education students in San Diego’s district schools than in charter schools. Unlike in Oakland and Los Angeles, where charter schools did not enroll a statistically significantly greater share of any moderate to severe disability than district schools, in San Diego, charter schools served a greater share of students classified in the disability category emotional disturbance, with less than a percentage point difference.
Last year, 16-year-old Kahlil played the lead role of Jean Valjean at a Berkeley Playhouse Teenstage production of Les Misérables. He finished the 10th grade through classes at a local community college, where he had a 3.50 GPA. But two years ago, Kahlil was far from the confident young man he is today, when his parents pulled him out of 8th grade at Oakland School for Arts (OSA), a charter middle and high school.

In 5th grade, Kahlil was diagnosed with a disability called auditory processing disorder after his teacher and his mom, Tracy, noticed that he was having trouble with schoolwork. Tracy said that it seemed like he was really trying to do the work, but often didn’t quite know what the work was. Kahlil was given an Individualized Educational Plan (IEP) at his district-run public school. But in 6th grade, he enrolled at OSA.

Kahlil had worked hard to get into OSA’s theater program. But according to Tracy, 6th grade was really a difficult year for their whole family because of academics. Kahlil would come home without really knowing what had gone on in his classes. It would take him—with help from Tracy—two to five hours every night to get through his homework.

In Individualized Educational Plan (IEP) meetings with the school staff, Tracy had no idea what services Kahlil could, or should, get to support him adequately, and would just agree to everything the school suggested. “OK, these are the experts,” Tracy thought, “they know what they are doing.” What the school provided, however, was clearly not helping Kahlil.

By 8th grade, both Kahlil and Tracy were completely burned out. Neither of them had it in them to put in hours of study time at home anymore. It was clear that Kahlil wasn’t getting the support he needed. Tracy asked the school to have someone check in with Kahlil for all his classes to make sure he understood the assignment and knew how to complete it. She also asked for approval for Kahlil to take his academic classes at a local community college but continue his arts education at OSA. The school denied both requests.

According to Tracy, the special education director of OSA had a different proposal. He told Tracy that he didn’t really see Kahlil going to college after high school, and suggested that her son could do high school diploma-track work, rather than college-track work. Tracy was stunned and scared. She suddenly realized that the school hadn’t been trying to help Kahlil succeed because they didn’t think he could. “My son and I came as the perfect student-parent contribution to his education,” Tracy said. “He wanted to succeed. As an 11 year old, he had put in two to five hours a day studying. I sat and helped him. I wasn’t not participating … if the school is also putting in their part, It seems like he should be able to succeed.”

Kahlil’s confidence was shaken, and he was suffering from depression and anxiety. Kahlil, who already had his heart set on a “dream school,” was doubting that he could even attend college at all. It was clear to Tracy that he needed a break. At the end of the year, Tracy pulled her son out of OSA. Read more of Tracy and Kahlil’s story on page 13 in the full report.
THE COST OF SPECIAL EDUCATION ENROLLMENT DISPARITIES FOR CALIFORNIA DISTRICTS

There is a high cost to California school districts as a result of how unequally charter schools enroll both special education students in general and students with hardest-to-serve disabilities in particular. This cost is borne by districts as a result of California’s formula for funding special education, which distributes funding roughly on a total per pupil basis, with no accounting for whether or not a student has a disability, or the severity of their disability.

We estimated, for the first time, the gross fiscal impact of these disparities on SDUSD, LAUSD and OUSD and found that they are significant—totaling between $64.52 million and $97.19 million at the three districts combined.7

<table>
<thead>
<tr>
<th>District</th>
<th>Cost of Overall Disparity of Special Education Enrollment in Charters</th>
<th>Cost of Overall Disparity + Severity Disparity of Special Education Enrollment in Charters</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDUSD</td>
<td>$5.10 million</td>
<td>$12.49 million</td>
</tr>
<tr>
<td>LAUSD</td>
<td>$50.90 million</td>
<td>$74.65 million</td>
</tr>
<tr>
<td>OUSD</td>
<td>$3.15 million</td>
<td>$10.01 million</td>
</tr>
</tbody>
</table>

In Los Angeles, our analysis found that as of the 2016-17 school year, the under-enrollment of students with disabilities in LAUSD-authorized charter schools is costing the school district at least $50.09 million—when factoring in just the disparity of overall special education enrollment—and as much as $74.65 million annually when the severity of disabilities of students is also included. In Oakland, we found the gross fiscal impact of this under-enrollment to OUSD is between $3.15 million and $10.01 million annually. Finally, in San Diego the estimated gross fiscal impact for the under-enrollment of special education students in charter schools ranges from $5.10 million to $12.49 million each year.
One way to understand why there is a cost to California school districts when charter schools under-enroll students with disabilities is to think of the federally guaranteed right to special education, accompanied by additional state and federal funding for that right, as a type of social insurance program. Under this insurance program, all families and all schools are insured against the higher costs of educating a child with special needs. In California’s funding structures for special education, level of need is pooled—just as in an insurance program. Pooling of need allows the higher costs of services for students with disabilities to be offset by the lower costs for general education students.

If we think of the right to special education as a type of social insurance program, this is what can happen as charter schools serving lower needs students segment the population.

However, because charter schools enroll students from the same geographic area without enrolling students with the same levels of need, we are left with two unbalanced pools for the social insurance program that is special education: a high-cost pool for the “coverage” offered by public schools that enroll higher percentages of the highest needs students, and a low-cost pool for the “coverage” offered by charter schools that enroll lower percentages of these same students. Because both pools are funded based on total enrollment, rather than based on the level of need of those enrolled, the cost is higher for districts carrying the higher needs students.
CONCLUSION

Advocates for students with disabilities have long held that charter schools do not enroll, and therefore do not serve, students with disabilities at the same levels as public school districts—either in overall enrollment or level of need—which leads to a greater fiscal impact for public school districts.

Our analysis affirms these concerns for the first time in the three California school districts we examined. Because of the structure for funding special education in California—which arguably disincentivizes enrolling students with disabilities in charter schools by funding based on total enrollment, and not need—we have no reason to believe that similar results would not be borne out in other districts throughout the state.

These findings are particularly important at this point in time in California, when a growing body of evidence shows that the rapid growth of charter schools has led to growing fiscal impact for public school districts. As policymakers at all levels of government weigh how to best meet the needs of California students equitably, we hope they will take these findings into account.

CONSIDERATIONS FOR POLICYMAKERS

The aim of our report was to provide an in-depth analysis of special education enrollment to quantify the anecdotal evidence so often cited by public education advocates. However, our analysis affirms the need for policy changes brought forth by advocates that would begin to address the inequities described in this report. The following represent just a few of those proposals:

1. Increase Federal Funding for Special Education: Perhaps the most obvious solution to these inequities would be for the federal government to meet its original 1975 obligation to fund 40 percent of public special education costs. This language is already in federal statute and requires only the political will to push Congress to budget the necessary resources. Federal lawmakers should make the original promise the absolute floor, rather than the ceiling, of funding for students with disabilities.

2. Federal Civil Rights Monitoring: The Office of Civil Rights within the US Department of Education must independently and proactively monitor student access to and service within charter schools across the nation. While some states are capable of effectively monitoring their education systems for civil rights abuses, the federal government’s total abdication of this power to prioritize equity and access has not, and will not, lead to a safer and more responsive system for students and their families.

3. Accountability and Oversight by the CA Department of Education (CDE) and Authorizers: The CDE should hold accountable both the charter schools that are underserving special education students, and the authorizers who are responsible for their oversight. This would not be the first time a state has moved to protect the rights of special education students, as the New York State Education Department’s Office of Special Education recently investigated and concluded the practices at Success Academy Charter Schools were violating the civil rights of special education students under the Individuals with Disabilities Education Act. Both Success Academy and the New York City Department of Education (Success Academy’s authorizer) were held accountable and corrective action was required.8

STATE OF DENIAL: California Charter Schools and Special Education Students
After a representative from a Futuro Prep charter school visited her daughter’s preschool, Nerey Bautista decided to enroll her soon-to-be kindergartner at the charter school instead of their local public school. After all, the Futuro representative made a compelling case: two teachers per classroom, “better” academic outcomes than the neighborhood school, a promise that her daughter would have “everything she needs” to be successful—all at no cost to families. Nerey was sure she was making the right choice for her child.

Around that same time, Nerey and her husband began to worry that their daughter didn’t seem to be developing verbal communication skills at the rate they were expecting. She asked the charter school representative about this and was repeatedly assured that her daughter would have the focus and support that she needed at Futuro Prep, whatever the challenge. “You won’t need to worry about anything,” the representative told her. In retrospect, Nerey is reminded of the old saying that if something seems too good to be true, then it probably is.

Nerey’s daughter entered kindergarten unable to communicate using phrases and speaking with only single words. She and her husband were told by Futuro Prep their daughter’s communication would grow as she progressed through school alongside her classmates, and that they would make sure she had everything she needed. Over the course of the next few months, Nerey’s daughter’s communication skills didn’t improve. Nerey requested an evaluation and asked the school to consider speech therapy. The evaluation determined that Nerey’s daughter was autistic. Soon, Nerey found herself attending a meeting at the charter school to discuss an Individualized Educational Program (IEP) that had been developed for her daughter. That meeting forever changed Nerey’s life as a parent.

During the IEP meeting, Nerey learned that her daughter had been regularly separated from the other students and taken to sit in the school’s main office until the end of each day. There, she was left alone to entertain herself with colored pencils and paper. According to Nerey, this happened “most of the time” she was enrolled at Futuro Prep, “because she was different than the other kids.” The charter school told Nerey that if she remained enrolled, she would likely be left behind the other students.

“It felt like they were not trying to help at all,” she said, “like they just wanted her out of the school.” She felt like she had somehow failed her daughter. She couldn’t believe that her daughter wasn’t receiving the services or the education she had been promised. “Coloring in a coloring book?!” Nerey said, “She could do that at home!” She left the school in tears, feeling incredibly sad and guilty for enrolling her daughter at a charter school without being fully aware of what was going on every day. Read more of Nerey’s story on page 29 in the full report.

NEREYDA BAUTISTA

You won’t need to worry about anything,” the representative told her. In retrospect, Nerey is reminded of the old saying that if something seems too good to be true, then it probably is.
4. Re-examine California’s Model for Funding Special Education to Account for Special Education Enrollment Disparities Between Districts and Charter Schools: California’s system of allocating special education funding based on total student population counts, as opposed to targeted counts of students by special education eligibility categories, has led to harmful fiscal impacts for the school districts we studied due to charter schools significantly under-enrolling these students. We have no reason to believe the results would be different for other districts.

This funding model makes two critical assumptions: that need does not vary by network or location, and that all schools are open to serving all students. These assumptions require further serious investigation because the current system actively discourages charter schools from both identifying students with disabilities, and perversely incentivizes the creation of barriers to access through enrollment.

5. Require Charter Schools to Join the Same SELPA as the District in Which They Are Located: California policymakers should return the responsibility of coordinating special education services for charter schools to local Special Education Local Plan Areas (SELPAs), and end the practice of allowing charter schools to opt-out of their local SELPA in favor of remote charter-only SELPAs that are sometimes hundreds of miles away.

As it stands, from a functional perspective, a student moving between schools within the same local area may have inconsistent accommodations and experiences due to schools belonging to different SELPAs. This undermines continuity of services, which is of utmost importance for special education students. This opt-out also undermines the fiscal stability of local school districts which, as our analysis found, are serving a disproportionately larger share of special education students without a larger share of funding.

6. Conduct Educational and Fiscal Impact Analyses When Considering New Charter School Petitions and Renewals: As fiduciaries of their local education agencies, and as elected officials entrusted to protect all students’ best interests, charter school authorizers must make economic and education impact analyses an essential part of both the charter school authorization and reauthorization processes. Elected officials, the authorizing body, and the public must have independent information about the impact of opening a new charter school in an established education community. Information should cover the full learning needs of all students, including essential topics regarding enrollment, retention, discipline, and the financial impact on the community and the neighborhood’s public schools. Districts must be allowed to use the findings of these impact reports as justification for denying new charter school petitions that will have an adverse fiscal impact on district programs and services.

7. Charter School Site-Based Special Education Committees: Coupled with both state and local governance oversight, charter operators themselves can take a proactive role to ensure they are open to and meeting the needs of all children in the community in which they operate. Each charter school campus should create a site-based special education committee. As those who spend the most time with special education students, both educators and parents are uniquely positioned to lead these committees.
Vanessa Aguirre’s daughter, Isabel, went to elementary school at a traditional public school in San Diego Unified School District, where she first was diagnosed with a learning difference in 3rd grade, and received an Individualized Educational Plan (IEP). When Isabel reached middle school, Vanessa decided to send her to The Learning Choice Academy (TLC) because her friends whose kids went there really liked it. She was assured by TLC staff that they would be able to accommodate Isabel’s disability.

A month into the first semester, one of the school staff requested to meet with Vanessa because Isabel was behind. They scheduled a meeting, but the TLC staffer called the day before the scheduled date to say that Vanessa had missed their meeting. This happened repeatedly, and each time Vanessa says the staffer told her that she would have to put a letter in Isabel’s file about the alleged missed meeting. It was Vanessa’s understanding that the school has a policy that after a parent misses three meetings, the student can be kicked out of the charter, making these events particularly stressful.

Further, Vanessa found out that Isabel was missing assignments that she had never seen. Two months into the school year, the school staffer showed Vanessa how to access the school’s online portal, where parents and students can see assignments and progress. Vanessa was excited that she could finally get Isabel on track to getting her work done. However, after a couple days of Isabel making good progress on her assignments, they were locked out of the website. The staffer had changed their password, and it took several days to figure out what had happened and make up for the interruption.

What ultimately made Vanessa realize that TLC wasn’t the right place for her daughter was when the special education staff told her, in contradiction of their initial promise, that Isabel’s needs were greater than TLC could accommodate. “I could tell they were trying to squeeze us out from the beginning,” Vanessa says, “but that really clinched it.” Read more of Vanessa and Isabel’s story on page 20 in the full report.

“Vanessa was new to the charter school, so she didn’t know what to expect, and didn’t push back. She now says that if she had one lesson to share with other parents from this experience it would be, “Speak up when you think something is wrong.”
LACK OF ACCESSIBLE DATA

One reason why research analyzing purported enrollment disparities between charter schools and their authorizing districts has not previously been performed is because basic, descriptive special education enrollment statistics are prohibitively difficult to obtain.

For our analysis, the necessary information and data gathering took more than six months, dozens of California Public Records Act (CPRA) requests, significant financial costs, numerous follow-up emails and phone conversations, and numerous clarifications and corrections of clear data anomalies that shuffled the researchers between multiple departments at many levels of educational governance.

It took several specially trained researchers 18 months to collect and analyze this data. Parents, especially parents of children with special needs, do not necessarily have the resources or the time to do this work, yet they have an even more pressing need for this information.

With hurdles at every stage of the analytic process, special education data in the state of California is far from accessible to the general public and must be improved. (See the full report for a full description of data issues encountered in our research.)
ENDNOTES


2 Special education funding, as with many other types of state education funding in California, is allocated based on student average daily attendance (ADA). Because of absences, ADA is always slightly lower than the total number of students enrolled in a school district or charter school at any given time. However, because the funding follows the student, we refer to this funding as “per-pupil” for ease of understanding, although this is obviously an imprecise term.

3 Fiscally independent, privately-operated charters schools act as Local Education Agencies (LEAs) that directly receive public education dollars from the state. This distinction is important for any study of the fiscal impact of charter schools, as “affiliated” charter schools are essentially “schools of the district” and are treated as such for budget purposes. Throughout this report, “charter schools” refers to fiscally independent, privately-operated charter schools. “District-run schools” or “schools of the district” include both traditional public schools and fiscally dependent, affiliated charter schools. All charter schools in Oakland and San Diego are fiscally independent from the school district, or “directly funded” by the state. Los Angeles has 70 charter schools that are fiscally dependent on the school district, or “locally funded,” these schools were treated as district schools. See the full report on page XX for a discussion about why the analysis was limited to these particular schools.

4 For this report our research team analyzed complete sets of data pertaining to each authorizing district (not samples) for descriptive and statistical significance.

5 We limited our analysis to charter school chains enrolling over 800 students, and with a presence in at least one of our cohort districts. See the full report on page 34 for more information about our methodology for this analysis.

6 We limited our analysis of stand-alone charter schools to those enrolling at least 400 students, and located in one of our cohort districts. See the full report on page 24 for more information about our methodology for this analysis.

7 See the full methodology for our calculation of the average cost of special education enrollment disparities beginning on page 9 of the full report.

8 New York State Department of Education Office of Special Education Written Decision (2019)

Authors: Anthony LeClair, Data Specialist, UTLA; Elaine Grace Regullano, CPA (inactive), Strategic Research and Analytics Director, UTLA; & Ann Swinburn, Strategic Research Analyst, CTA

Thanks to Terry Lutz for the report design.
MAJOR POLICY - Immediate Action (2/3rd vote required)
NONE

MAJOR POLICY – First Reading
NONE

OTHER ITEMS FOR IMMEDIATE ACTION
NONE

REFERRALS TO THE BOARD OF DIRECTORS
NONE

MATTERS PENDING
NONE

INFORMATION ITEMS

1. The Committee welcomed Isabelle García who provided an update on bills and the legislative session ahead of us.

2. The Committee is continuing to work on the creation of presentations/trainings related to the implementation of Proposition 58 and the creation of biliteracy programs that could be provided to stakeholder groups.

3. The Committee is in the process of gathering from across the state, collective bargaining agreement language related to Dual Immersion and Multilingual programs.

4. The Committee received an update on the Schools and Community First.

5. In response to the referral from the CTA Board of Directors, the LNG committee reviewed information on the English Learner Progress Indicator (ELPI) in the dashboard.
Since there was no action taken at the SBE September meeting, LNG will continue to monitor the changes and provide feedback to the liaisons and SBE as the ELPI develops.

6. The LNG Committee accepted nominations for the vacant Vice Chairperson committee position.
POLITICAL INVOLVEMENT COMMITTEE
Dorothy Kim-Perez, Chairperson
Shay Lohman, Vice Chairperson
Jerome Rice, Recording Secretary
Roberto Rodriguez, Board Liaison
Teri Holoman, Consultant
Rick Wathen, Consultant
Toni Trigueiro, Legislative Advocate

MAJOR POLICY – Immediate Action (2/3 vote required)
None

MAJOR POLICY – First Reading
None

MAJOR POLICY – Second Reading
None

OTHER ITEMS FOR IMMEDIATE ACTION
A. Recommend that CTA support the School Bond (AB 48).
B. Authorize up to $6 million from the Initiative Fund to support CTA positions on the 2020 ballot.

REFERRALS TO THE BOARD OF DIRECTORS
None

MATTERS PENDING
None

INFORMATIONAL ITEMS
1. Chair Dorothy Kim-Perez updated the committee on the Campaign Workgroup 2020 and debriefed about the October Political Activist Academy.
2. Board Liaison Roberto Rodriguez presented a Schools and Communities First update.
3. CTA/ABC Chair Wendy Eccles presented a CTA/ABC report to the Committee.
4. Associate Executive Director of GR Teri Holoman gave a Governmental Relations and legislative update.
5. Michael Borges discussed Schools and Communities First and the revisions when refiled.
INFORMATIONAL ITEMS

1. The sub-committees continued working on the following policies:

a. Dismissal Subcommittee: The committee will continue to work on language defining evaluation and support for probationary and temporary certificated employees. Legislative advocate, Patricia Rucker, provided information regarding legislation passed in all other states on probationary due process. The discussion is based on the foundation of attracting and retaining qualified educators.

b. Evaluation Subcommittee: The Evaluation Subcommittee is continuing to work on developing guiding principles for local associations regarding members who have non-classroom based
assignments. The Committee met with representatives of PR&R to coordinate efforts.

c. Academic Freedom and Special Projects: The committee met with the Legislative Advocate Patricia Rucker to continue work on their academic freedom project.

2. The Committee reviewed CTA’s Commission on Professional Competence Program and requested members to consider nominating themselves or other qualified members to sit on hearing panels to ensure due process for teachers. See subsequent pages for information.

3. Board Liaison Shelly Gupton introduced the Schools & Communities First signature gathering efforts to the Committee with information on where to get resources.

4. Chair Alexandra Condon welcomed all the new and returning Committee members.

5. The Committee thanked and celebrated the retiring CTA Staff Consultant Chuck King for his years of guidance on TEAF.
CTA'S COMMISSION ON PROFESSIONAL
COMPETENCE PROGRAM

Commission On Professional Competence Hearings
Education Code Section 44944 sets forth that Commission on Professional Competence (“CPC”) hearings are to be held when a school district moves to dismiss a teacher. That teacher or other certificated employee has a right to a “due process” hearing in order to determine if there are sufficient grounds to dismiss or impose a lengthy suspension upon him or her. These hearings are also commonly referred to as CPC hearings. The Office of Administrative Hearings (“OAH”) is the State agency board that oversees this process. Pursuant to Education Code Section 44944, CPC hearings are usually held before a three-person panel comprised of an Administrative Law Judge (“ALJ”), a district appointee and a teacher appointee. Under CTA’s CPC program, the teacher’s appointee is appointed with CTA Legal assistance. This three-person panel hears and evaluates the evidence presented and together they make a written determination if the district has sufficient evidence to dismiss the teacher. Both the teacher and district appointees must possess a currently valid credential and have at least 3 years of experience (out of the last 10 years) teaching in the same discipline as the teacher who is the subject of the hearing. In addition, a CPC panel member may not be related to the employee respondent in the case and may not be an employee of the district initiating the dismissal or suspension.

CTA Legal Department and the CPC program
In order to successfully reflect the diversity of our members and ensure teachers’ right to due process, CTA Legal works with CTA State Council’s Teacher Evaluation and Academic Freedom (“TEAF”) Committee to reach out to CTA’s Leadership statewide and request that they nominate strong teacher-representatives to serve on CPC panels for this important program. Prospective panelists must be first nominated and approved by the CTA Board before he or she can be appointed as a teacher appointee in a due process hearing. After the Board approves their nomination, training for all newly appointed CPC panelists will be arranged or conducted by CTA. The State requires that any and all CPC panelists (current teachers or retired teachers) must hold a valid credential and have at least 3 years of experience (out of the last 10 years of teaching) in the same discipline as the teacher who is being dismissed. Under CTA’s CPC program retired teachers can only serve as panelists for 7 years after the year of their retirement. Only current members of CTA or CTA Retired may apply to be CPC panelists under CTA’s CPC program.
CTA Legal assigned a CPC coordinator within the department to manage the CPC program. The CPC coordinator is in charge of designating and locating CPC panelists to serve on due process hearings when requested by the teacher’s attorney. Currently, CTA Legal has a pool of approximately 124 trained members, including retirees, to call upon for such hearings.

**How does the CPC program work?**
Attorneys representing teachers will send a request for a CPC panelist to the CPC Coordinator. The attorney instructs the CPC Coordinator what specific credentials and teaching subject areas are needed for a teacher appointee. Once provided with all the information, the CPC coordinator will email those individuals within the CPC pool with similar credentials but who do not work at the same district as the teacher in need. A CPC appointee-volunteer is chosen from those who agreed to serve.

Once a volunteer has agreed to be appointed, the attorney for the teacher is notified by the CPC Coordinator of the appointed panelist’s name and credentialing and teaching experience information. The appointed panelist will then be contacted directly by the attorney (or the firm’s associate staff) to reconfirm hearing dates, start time and location of the hearing.

The CPC Coordinator will correspond with the panelist’s employer-district and HR department to request CPC release time as well as provide instructions on how their HR department can claim reimbursement for substitute costs. CTA Legal does not pay for the costs of acquiring a substitute; we merely notify the district that a substitute needs to be arranged while a panelist is serving on a CPC hearing.

The appointed panelist’s Credential and Experience data sheet will be provided to the attorney for the teacher who will in turn present that information to the ALJ to confirm the panelist is qualified to serve (or not) on the dismissal panel.

Once a CPC panelist is confirmed (the attorney will notify the panelist) to a hearing, he/she can move forward in making appropriate travel arrangements necessary for the hearing (keeping in mind the State’s basic travel expense and costs guidelines). All travel arrangements are to be made by the panelists themselves.

**How do CPC panelists know what to do if appointed to a CPC hearing?**
Newly appointed panelists will be provided material by CTA Legal and training will be conducted by CTA and/or a CPC Liaison to become an effective teacher appointee on CPC hearings. Serving on a CPC hearing is similar to serving on jury duty which requires panelists to adhere to the same rules of fairness, impartiality and confidentiality. The ALJ assigned to the hearing will also send a letter to the CPC panelists prior to the hearing explaining their roles and duties. The ALJ will request to meet with the CPC panelists before the hearing commences to advise the panelists of other cautions and rules in more detail on day one of the hearing.

**What does being part of the CPC program entail?**
Once entered into the CPC program, a CPC panelist may be contacted by the CPC coordinator and asked to serve on a panel. CPC assignments may range from once every
couple of years to a few times a year depending on the need for certain subject areas or grade levels requested. Many times a hearing settles before it actually commences.

If assigned to a hearing during school breaks (i.e. summer vacation), full time active teacher panelists are entitled to per diem pay upon proof from their school district. Retiree panelists are entitled to a daily substitute pay rate (based on substitute pay in the district commencing with dismissal proceedings) while serving on a panel at any time of year.

The length of a CPC hearing can range from approximately 1 day to 15 days depending on the alleged accusations against the teacher and the schedule or caseload of the parties involved.

The hearing locations vary and they may occur at the administrative offices of a school district making the accusation against the teacher or they can be held at the various OAH locations closest to the district. The CPC coordinator strives to place a CPC panelist that lives closest to the hearing site. There are certain times where panelists from Northern California are asked to sit on dismissal panels in Southern California and vice versa.

All CPC expenses related to the hearing (per the State’s basic travel expense and costs guidelines or the respective district guidelines for travel) are reimbursed by the district commencing with dismissal proceedings and/or by the State after a decision as to the matter has been rendered. There is a 60-day window of time after the decision has been rendered for panelists to submit their CPC related expenses to said district and/or the State in order for a panelist to be reimbursed for the hearing they were appointed to. If the 60-day deadline is missed, unfortunately, the panelist forfeits the right to reimbursement.

**What about a CPC panelist’s time off when appointed to a hearing?**
A CPC panelist appointed to a dismissal hearing does not use any sick, vacation or PN days to take time off to serve on a due process hearing. Per Education Code Section 44944(e), an appointed CPC panelist shall have their full salary and benefits paid for by their respective districts while they serve as a CPC panelist. CTA Legal will send a letter of release to the appointed panelist’s district to notify the district of this CPC assignment and to ask that district to arrange for a substitute accordingly. CTA Legal will inform the CPC panelist’s employer that CTA does not pay for substitutes costs, the employer must submit those costs after the hearing has ended to the State and/or to the district that commenced dismissal proceedings.

**What does the CPC Coordinator do?**
The main importance of the CPC coordinator is to assign the most qualified panelists to CPC hearings when requested by attorneys for their teacher-clients. On any given month this can be approximately 10 — 15 requests as well as managing the scheduling of ongoing cases. In doing so, the CPC coordinator orchestrates the following:

- Confirmation and notification to the attorney that a specific CPC panelist (or a change of a panelist) has been assigned to their client’s dismissal hearing.
Handles all written notifications to the employer-district's Superintendent/HR dept. when a CPC panelist has been appointed to serve on a CPC hearing, provides revised notifications of changed hearing dates, or handles written notification of withdrawals of requests for CPC release time.

- Provides and distributes to CPC panelists all the necessary paperwork, forms and guidelines related to performing their CPC duties.

- Assists panelists with any questions or concerns.

- Handles CPC panelists' requests for advance reimbursement of expended costs (upon review and approval by Chief Counsel) if financial hardship is expressed at the conclusion of having served on a CPC hearing.

- Annually updates pool of CPC panelists and presents to Chief Counsel the need (if any) for additional CPC volunteers in specific teaching areas and fields.

- Annually processes new CPC nominations for CTA's Board approval.

- Works with Chief Counsel, the Legal staff and CPC Liaisons to prepare and organize training and materials for the CPC program.

Acronyms or terms commonly used for this program

CPC hearing = Commission on Professional Competence hearing, a 3-person panel that sits and hears evidence to determine if the district's accusation is sufficient to dismiss a teacher or other certificated employee from a district. The 3-person panel is comprised of an Administrative Law Judge, a district representative and a teacher representative.

OAH = Office of Administrative Hearings, the State agency board that governs and administers dismissal proceedings for the district and teachers.

ALJ = Administrative Law Judge, one member of the 3-person panel that presides over a CPC hearing.

Governing Board = The district that is bringing forth dismissal accusations against a teacher.

On behalf of CTA Legal, we thank you very much for expressing an interest in this vital program!

CTA Legal Department
Ms. Mary Gutierrez, CPC Coordinator
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CTA's CPC Program Information Sheet
EARLY CHILDHOOD EDUCATION COMMITTEE

Paula Merrigan, Chairperson
Reagan Duncan, Vice Chairperson
Reagan Duncan, Recorder (this meeting only)
Bill Freeman, Board Liaison
Ann Adler, Consultant
Michael Stone, Consultant
Toni Trigueiro, Legislative Consultant

MAJOR POLICY: For Immediate Action (2/3 vote required)

None

MAJOR POLICY: First Reading

None

MAJOR POLICY: Second Reading

None

OTHER ITEMS FOR IMMEDIATE ACTION

None

REFERRALS TO THE BOARD OF DIRECTORS

None

MATTERS PENDING

None

INFORMATIONAL ITEMS

1. Paula Merrigan, ECE Committee Chairperson, welcomed the Committee members. In her report, she highlighted the following:

   SSPI Transition Team which meets again on October 30th to discuss suspension/expulsion/chronic absences. Paula discussed with the group that lack of developmental appropriateness of curriculum leads to increased behavior issues, which often leads to the suspension/expulsion problem.

   Alliance for Early Success meeting. The group discussed priorities for early education with the voice of educators in mind.
They also discussed the need for dual-credit programs for educators with CDE we have pipelines for computer science, health services, etc., but often do not offer this route for promoting careers in education in our high schools.

Early Edge Advisory Group Meeting discussed the Governor’s 2019/20 Early Childhood budget and legislation that includes $2 billion dollars. It also provides 10,000 new full-day preschool spaces in community-based organization programs and funds investments in early learning facilities.

The Work Force Development Grant provides $195 million to be distributed by the CDE through Quality Counts over 3 years to be used for education and training for early learning teachers. Funds can cover tuition, supplies, transportation, sub pay, PD, and coaching.

The Preschool Development Grant provides $10.6 million in federal money to the CDE to improve California’s Early Learning system. The final plan is not yet available, but will be aligned with the Governor’s Early Childhood Master Plan. The Master Plan has not yet been created. The Blue Ribbon Commission’s final report from April, 2019 will be the basis of formulating the Master Plan. There will be a 27-member panel (CTA has not yet been invited to this group). Paula has requested CTA to select a representative that has ECE experience.

2. Toni Trigueiro, Legislative Advocate, provided materials and shared information about current ECE state and legislative issues. She discussed the deliberations on AB 428 regarding 3-year olds with special needs transitioning to school programs. She shared that the Governor vetoed the full day mandatory kindergarten bill due to facilities and money. Toni suggested that ECE work to include ECE funding principles in the FPE budget principles for CTA. In her packet of information, she included a bargaining advisory on “disrupted learning” as well as the report done by the Oregon Teachers Association on the topic. She reminded the ECE Committee that CTA has approved a January 27 meeting of 5 committees to continue dealing with this topic AB 420 to SB 419. Her packet also included information on student health issues and an analysis of LCFF spending as well as Governor signatures and vetoes on bills.

3. Consultants Ann Adler and Michael Stone trained ECE members on the committee’s purview and procedures.

4. The Legislative subcommittee reviewed last year’s ECE bills and learned how the subcommittee makes recommendations to the ECE Committee using policy.

5. The Policy subcommittee reviewed the June changes adopted by State Council and found one error which has been reported to CTA.

6. CTA Board Liaison, Bill Freeman, re-introduced himself. He shared information on Schools and Communities First and encouraged people to participate in the social media campaign.

7. Liaisons to the Committee reported as follows:
California Association for the Education of Young Children (CAEYC)-Yvonne Molles: No report.

California Kindergarten Association-Maria Crisologo-Lum: No report.

First Five California-Monique Segura: Please encourage families to report their 0 to 5-year old children in the 2020 Census. They are the most underrepresented people on the census. The next meeting of First Five is in January. The summit is February 3-5, 2020.

California State PTA-Lynette Henley: No report.
SCHOOL SAFETY/SCHOOL MANAGEMENT COMMITTEE
Eric Roudabush, Chairperson
Jennifer Bradford, Vice Chairperson
Chris Finley, Recording Secretary
Robert Ellis, Board Liaison
Alva Rivera, Co-Consultant
Helen Farias, Co-Consultant
Toni Trigueiro, Legislative Advocate

MAJOR POLICY – Immediate Action (2/3rd Vote Required)
None

MAJOR POLICY – First Reading
None

MAJOR POLICY – Second Reading
New Section p. 292

Employee Access to Facilities

CTA believes LEAs policies should provide personnel direct access to facilities pertinent to their job duties. All district employees, including substitutes, should have access (keys, codes, proxy card, etc.) to the facilities (such as classrooms, restrooms, and gates) pertinent to their individual assignments. The ability to lock and unlock the door related to their assignment, will not only assist in emergency situations, but also maintain efficient operations of the school.


CTA believes all school districts in the State should adopt and periodically review disaster and emergency procedure plans to reflect the following concerns: emergency communication system including methods for informing parents about the movement of students and their location, evacuation procedures from school sites or portions thereof, disaster and emergency equipment on site, student relocation sites and transportation procedures, and individualized plans for sites with unique problems. All school safety plans should include the procedure to lock doors from the inside by any employee who may be responsible for the safety of students.

Schools, organizations and institutions which share facilities should maintain a coordinated site safety plan that contains shared notification procedures for emergency situations. In addition, training must be provided for all school staff in emergency protocols and procedures to be followed in the event of violence on campus.
OTHER ITEMS FOR IMMEDIATE ACTION
None

REFERRALS TO THE BOARD OF DIRECTORS
None

MATTERS PENDING
NBI 10/19-4
“The school safety and management committee will develop policy and recommend guidelines and procedures for school districts to follow in the event of fires, electrical outages and poor air quality.”

INFORMATIONAL ITEMS

1. Chairperson Eric Roudabush discussed the impact of wildfire smoke on indoor and outdoor air quality, and his experiences in the classroom during fires last spring. He asked the committee to review the issue from both a school management and school safety perspective. In addition, he shared how power outages are also creating safety concerns at school sites, and requested the committee research relevant policies and procedures.

2. Eric Roudabush thanked the returning committee members and welcomed new members.

3. Board Liaison Robert Ellis shared information regarding the Schools and Community First ballot initiative and encouraged committee members to participate in actions taking place at State Council including photo opportunities, the Sunday morning press conference, and petition signing and signature gathering. He also asked members to attend the American Indian Alaska Native Observance on Saturday evening.

4. Staff Consultant Helen Farias shared several articles on school safety and climate. The first focuses on later start times implemented at certain San Diego Unified high schools as part of the Healthy Start Times initiative. Another article addresses a Portland lawsuit filed by a teacher who sustained injuries from a violent special education student. A third article reports on injuries sustained by a teacher and student when intervening in a student altercation. An additional article regarding school management practices for trauma informed schools was shared. Staff Consultant Alva Rivera provided a summary of the “50 State Comparison of K-12 School Safety.” She shared an additional article and updated bargaining advisory on restraint and seclusion (AB 2657), as well as the updated bargaining advisory on pupil suspension and expulsion (AB 419). Chapter presidents and bargaining chairs have access to both bargaining advisories via CTAssearch.org.
5. Staff consultants presented an overview of the California Education Codes specific to school safety including: school safety plans, student discipline policies, suspension and expulsion, notification of dangerous students, restraint and seclusion, and incident reports to law enforcement.

6. Legislative Advocate Toni Trigueiro shared updates on areas of concern including the Governor’s veto of AB 1322, which would have created an Office of School Based Health. She explained how Prop 63 monies, currently allocated to counties for mental health support, could be used to coordinate with school district for student mental health needs for students. Toni encouraged the committee to review Oregon Education Association’s report on the Crisis of Disrupted Learning.
MAJOR POLICY – Immediate Action (2/3rd Vote and Rationale Required)

A. None

MAJOR POLICY  First Reading

A. None

MAJOR POLICY  Second Reading

A. New Section, page 294

Social Media

Social media is a dynamic and ever-changing tool which allows education employees to interact with stakeholders and the student community in an age appropriate manner. Local associations should support efforts to use social media to improve the quality of communications, to enhance the working conditions of the education employees and their rights. Social media means any online platform for collaboration, interaction, and active participation, including but not limited to social networking sites such as Facebook, Twitter, YouTube, LinkedIn, Snapchat, Instagram, blogs, etc.

CTA believes that education employees need to be aware of their limits and liabilities of privacy, including perceptions their posts or pictures may create. Furthermore, education employees also need to be aware of the nuances of law, employer rights and web-based privacy settings. When using social media, education employees shall abide by ethical standards of on-line behavior. Education employees must have respect for the access, security procedures and systems of their district.

CTA believes education employees shall recognize and reflect high standards of professionalism accorded to public service employees’ mandates. Education employees must also use caution when making any post that may reflect negatively on their professional image; there is no expectation of privacy.

CTA believes that it is important to systematically educate and protect education employees against the professional and personal dangers regarding social media. CTA further believes it is important that education employees clearly understand the risk factors and possible ramifications of using social media personally and professionally.

R - 1
OTHER ITEMS FOR IMMEDIATE ACTION

A. None

REFERRALS TO THE BOARD OF DIRECTORS

A. None

MATTERS PENDING

A. The Committee started discussions of a joint committee with TEAF, Negotiations, and CPD to develop guidelines for districts to address the working conditions and practices of Teachers on Special Assignment (TOSA)/Instructional Coaches, such as job descriptions, funding, evaluation, parameters, calendar/hours, and professional development.

INFORMATIONAL ITEMS

A. The Committee engaged in discussion regarding the Schools and Communities First initiative.

B. CTA Legislative Advocate Seth Bramble gave an overview of the 2018-2019 Legislative year.

C. The Committee selected Sub-Committee Leadership for the 2019-2020 year.
   Contract Rights:
   Chair: Aimee Urbien
   Vice-Chair: Meredith Beachly
   Recorder: Elva Lopez-Zepeda

   Non-Contract Rights:
   Chair: Renata Sanchez
   Vice-Chair: Gina Skov
   Recorder: Janet Lau

   Legislation:
   Chair: Thomas Johnson
   Vice-Chair: Alan Locke
   Recorder: Denise Rutan-Jones
MAJOR POLICY - Immediate Action (2/3rd vote required)

None

MAJOR POLICY – First Reading

None

MAJOR POLICY – Second Reading

None

OTHER ITEMS FOR IMMEDIATE ACTION

None

MATTERS PENDING

None

INFORMATIONAL ITEMS:

1. Jerry Eaton, CTA Board Liaison:
   a. Schools and Communities First (SCF) – This weekend kicks off signature gathering to put SCF on the November 2020 ballot. CTA is a part of the largest coalition in its history to close the tax loophole benefiting large corporations. 1.3 million signatures are required by the end of March 2020. State council members are asked to assist in this great effort.

2. Taunya Jaco/Julius Thomas, NEA Board:
   a. Visit www.StrongPublicSchools.org
      i. Take the pledge to be a public education voter
ii. Review and compare presidential candidates’ stance on sixteen issues important to strong public schools
iii. Give your voice via writing or via a video
iv. Sign up to host a house party. November 6th is the House Party Kickoff. It is a year away from the 2020 elections for our next president.
v. NEA RA first presidential forum held
vi. Community ally link is available www.tinyurl.com/joinNEA

b. Higher ed advisory act – Lamar Alexander (R) is trying to get something done
c. Leadership Summit: March 2020 in Orlando, FL
d. Higher Education Conference
e. 3rd conference?

3. C. Scott Miller, Equality California (EQCA) Liaison:
   Equality California sponsored 12 state bills and three resolutions in 2019. The Legislature adopted all three resolutions. Governor Newsom has signed five bills. Four of EQCA sponsored bills were converted into two-year bills and are eligible to be taken up again in 2020. Three EQCA sponsored bills were held by Appropriations Committees, effectively killing them absent a rule waiver. EQCA also opposed one bill and defeated it. With the passage of five bills and three resolutions this year, Equality California has now passed 150 pro-equality pieces of legislation.

PASSED:
   A. AB 493 (Gloria) Safe and Supportive Schools Act
   B. AB 711 (Chiu) Academic Records
   C. AB 785 (Bloom) Gametes
   D. SB 159 (Wiener) PrEP & PEP Access
   E. SB 495 (Durazo) Custody Determinations

SPONSORED TWO YEAR BILLS:
   F. SB 132 (Wiener) Transgender Respect, Agency, and Dignity Act
   G. SB 145 (Wiener) LGBTQ Young People Nondiscrimination
   H. SB 201 (Wiener) Intersex Autonomy
   I. SB 741 (Galgiani) Affirming Records

SPONSORED BILLS – HELD BY APPROPRIATIONS COMMITTEE
   J. AB 307 (Reyes) Homeless Youth Grant Program
   K. AB 650 (Low) LGBTQ Mortality Data
   L. AB 758 (Carrillo) Equal Pay Act Update

RESOLUTIONS - PASSED
M. ACR 27 (Carrillo) Honoring Bayard Rustin
N. HR 12 (Gipson, Gloria), SR 15 (Mitchell, Atkins, Bradford, Galgiani, Wiener) Black HIV/AIDS Awareness Day

4. Mary Levi, Native American Heritage Commission (NAHC) Liaison:
   a. Proceeds from purchasing Protect Native Culture license plates go to the NAHC to protect California native culture.
   b. There is regulation language under review by NAHC to return remains of natives to their most likely descendants.

5. Mary Rose Ortega, Minority At Large, CTA-Retired Liaison:
   a. The CTA/NEA-Retired Conference will be February 27-28, 2020 preceding the CTA Human Rights Conference. Two scholarships to retired ethnic minority teachers from southern California will be awarded.
   b. CTA/NEA-Retired received a $7,000.00 NEA Grant for the “Retired Action Network” update/review. This grant will assist in lobbying efforts and in collaboration efforts with community organizations like CARA (California Alliance for Retired Americans) which are currently working on getting signatures for “Schools and Communities First” Initiative.
   c. CTA Campaign 2020 plan: Service Centers and/or local CTA affiliates are encouraged to include CTA-Retired in their campaign plan to collect signatures for the Schools and Community First initiative.
   d. New Retired-Life Memberships, Retired-Annual Memberships and Annual Renewals are now available online at cta.org/retired
   e. NEA/CTA-Retired is pairing first and second year teachers with retired educators. The goal is provide personal one-to-one support for new educators with experienced mentors. CTA Affiliate presidents interested in getting more information or setting up a program should contact Marc Sternberger (marcpea@aol.com).
   f. Bills have been introduced in the US House and Senate to repeal the Social Security Offsets (GPO/WEP). Social Security Fairness (H.R. 141) Rodney Davis (R-IL) would fully repeal both GPO and WEP. A companion bill (S.B. 521) has been introduced in the Senate by Senators Sherrod Brown (D-OH). Please contact your members of Congress and encourage them to support bringing these bills to floor.

6. Dixie Johansen Asian American Advancing Justice Liaison: The Asian American Advancing Justice is the largest Asian law center in the country. They provide education on parenting, citizenship, navigating the public education system and immigration rights to name a few offerings.

7. Cecily Myart-Cruz reported out CTA President E. Toby Boyd forwarded a letter onto Trustees of the California State University opposing the changes to first-year admission eligibility requirement after CRE and C&I reviewed CSU’s proposal
for changes. CRE is grateful for ongoing opposition efforts to CSU’s proposed changes.

8. Dr. Kimani Norrington-Sands, PhD, Clinical Psychologist: Presented *Cultural Context and Trauma: Implications for Students*” as a primer for the CTA workgroup’s work to address the on-going crisis of disrupted learning environments in California classrooms. Representatives of the five committees (ECE, SSM, SPS, SEC, and CRE) charged with developing a comprehensive campaign were invited to attend.

   a. Recommended reading: *The Deepest Well* by Dr. Nadine Burke Harris, Surgeon General of California
   b. Recommended TED Talk *How Childhood Trauma Effects Health Across a Lifetime* with Dr. Nadine Burke Harris, Surgeon General of California
MAJOR POLICY – Immediate Action (2/3rd vote required)

None

MAJOR POLICY – First Reading

Location: Human and Civil Rights pg. 322

Net Neutrality

CTA believes that Net Neutrality is essential to an equitable society and free democracy and that the information on the Internet is a public resource that should be available to all people equally. Net Neutrality is the principle that all Internet communications are treated equally, and Internet Service Providers (ISPs) will not discriminate, charge differently or restrict any use based on the user, content, method of communication, location or otherwise. Net Neutrality ensures that the full resources of the Internet and means to operate on it are open to all without restrictions, enabling anyone to access, utilize and share all available information.

Rationale:

With Net Neutrality, ISPs are prohibited from blocking, slowing access or charging for specific online content. A chief concern among Internet freedom advocates is that without Net Neutrality, corporations will be able to determine who can access information on the Internet and what information will be available. Without Net Neutrality, access to information on the Internet could be restricted or blocked for reasons ranging from how much a user paid to whether an ISP (like Comcast or AT&T) disagreed with the content.

Access to information and the internet must be equitable—not based on where a user lives, what they want to access or whether they can afford it. Net Neutrality is the belief that all people have the right to access and utilize the Internet equally, without restrictions or barriers due to the type of content or who is providing it. Ultimately, Net Neutrality is about preserving civil rights and protecting a space for all voices online. A small number of large corporations should not be allowed to control access and content on the Internet—these are not appropriate or responsible gatekeepers to one of the most important information, communication and organizing tools of our time. The Open Internet empowers traditionally marginalized communities with new opportunities of self-expression, entrepreneurship, political participation, education, employment, housing, health care and racial justice. It also guarantees that students will continue to be able to use the Internet without restriction to access information, enhance their learning, communicate with others here and abroad, and ensure their digital voices have a presence.
OTHER ITEMS FOR IMMEDIATE ACTION

None

REFERRALS TO THE BOARD OF DIRECTORS

1. Recommendations for 2018-19 Communications Awards

MATTERS PENDING

NBI 10/19-13

CTA will add ACR 117 Gang Awareness and Prevention for All (GAP4ALL) to the CTA calendar and use existing resources to publicize this addition.

Rationale: Putting it on the calendar will help members know about this new resolution.

NBI 10/19-19

That the CTA Educator magazine run an article on the topic of the Fiscal Crisis Management and Assistance (FCMAT) based on an examination of the agency’s operations and its effect on teachers and students for the purpose of educating the membership.

Rationale: The Fiscal Management Assistance Team (FCMAT) is a non-elected, private, public all financed body that exercises its authority with little public knowledge or oversight. FCMAT in effect has had veto power over the financial decisions of many school districts, including Inglewood, West Contra Costa, Oakland, Compton, Vallejo, and other K-12 and community college districts. These financial decisions can affect the contracts and working conditions of teachers and other personnel in those districts.

INFORMATIONAL ITEMS

1. Chairperson James Benanti welcomed everyone to the first Communications Committee of the year by starting off with introductions and went over changes to the committee structure.

2. Vice-Chair Randa Wahbe talked about the work of the three standing subcommittees: awards, policy and advisory. The awards subcommittee looked at 60 entries, which is a new record. The Policy subcommittee chaired by Patrick Bernhardt finalized the Net Neutrality language. The Advisory subcommittee chaired by Dan Nelson reviewed the CTA website redesign, members had the opportunity for input and suggestions as that process moves forward.

3. Board Liaison Gayle Bilek discussed the Schools and Communities First Initiative and what committee members will be asked to do going forward.

4. Communications Manager Jonathan Goldman went over the updated framework for the narrative “An Education System Built For All of Us” which had been reviewed by the committee last year. This narrative was created in partnership with 20 other community groups and organizations focused on racial justice and equity issues. Members were asked to review and offer feedback.
5. Associate Executive Director Becky Zoglman shared CTA’s Back to School ad campaign, which is made possible through CTA’s Media Fund. The campaign consists of TV, radio, social media, and print advertising in ethnic minority publications.

6. Assistant Communications Manager Claudia Briggs updated members on the success of charter school legislation, thanking members for their hard work making this happen. In addition she shared that Speaker Bureaus for the Schools and Communities First Initiative will be starting in November and will be held throughout the State.

Old Business

None

New Business

None
MAJOR POLICY – Immediate Action
A. NONE

MAJOR POLICY – First Reading
A. NONE

MAJOR POLICY – Second Reading
A. NONE

OTHER ITEMS FOR IMMEDIATE ACTION
A. NONE

REFERRALS TO THE BOARD OF DIRECTORS
A. NONE

MATTERS PENDING
A. NONE

INFORMATIONAL ITEMS

1. The CPD Committee reviewed the Educator Workforce Investment Grant, a new professional learning initiative funded in the 2019-20 education budget and provided input on critical areas for professional learning for teachers and paraprofessionals through the EWIG Development Survey. Full information can be found at https://www.cde.ca.gov/pd/ps/ewig.asp.

2. CPD elected Angela Der Ramos the Recording Secretary for the committee.

3. CPD reviewed the referral from the CTA Board of Directors to review policy on the Eminence Credential. The committee provided feedback to the CTA Liaisons to the Commission on Teacher Credentialing for potential Commission action.
4. The CPD Committee reviewed the draft Teaching Performance Expectations (TPE) for the Development of Literacy and Assessment Options for credential candidates to demonstrate their readiness to teach reading. Details can be found at https://www.ctc.ca.gov/docs/default-source/commission/agendas/2019-09/2019-09-5c.pdf?sfvrsn=2.

5. The CPD Committee heard a report from the professional development subcommittee on the 21st Century California School Leadership Academy (CSLA), a statewide leadership professional learning program for administrators and teacher leaders, that is being implemented in 2019-20.

6. CPD is working with AST to review policy on teacher/educator representation and will continue the work at the next State Council.

7. Legislative Advocate Isabelle Garcia reported on the status of bills assigned to CPD at the end of the legislative session.
Sergio Martinez called the meeting of the Liaison Committee to order.

**LIAISON COMMITTEE OF THE WHOLE**

A liaison Training was held for our newly appointed Liaisons. There was a panel discussion that was led by Sergio Martinez and Mike Patterson. Our panelists were, Yvonne Molles, Allen Freemon, Ruth Lueavand and Angela DerRamos who shared their knowledge and expertise with the new liaisons. Dawn Basurto, conducted a presentation on the Nuts and Bolts of the Liaison Program.

**SUMMARY OF REPORTS**

One Thousand Counselors attended California Association of School Counselors Conference. The Executive Director is working with ACLU on school based mental health services.

2020 Census most under-reported population is 0-5years. Funding based on Census is never enough.

FPPC is requesting that you make sure your local is prepared with the proper forms and procedures in School Board Elections. Don’t get hit with fines. FPPC 18419 Regulation could affect the Member Lobby Program.

RICA (SB614) is a 2year bill to eliminate RICA, this bill will be reviewed in January 2020.

Equality California sponsored 12 State Bills and three resolutions in 2019. The Legislature adopted all three resolutions. Governor Newsom has signed three of the five bills. Four of EQCA sponsored bills were converted into two-year bills and are eligible to be taken up again in 2020. Three EQCA sponsored bills were held by Appropriations Committees, effectively killing them absent a rule waiver.

Almost every group reported on issues with the teacher pipeline, for both CTE and Adult Ed teachers. CITEA discussed an interesting idea of letting current general education credentialed teachers take 12 community college units to earn a designated subject’s credential.

CCAE is concerned that SB 563 does not include a provision for undocumented students to take advantage of dual enrollment classes for adult learners.
SBE had an item on their agenda regarding a Seal of Civic engagement. There is still much discussion on the criteria at the state level, with lots of worrying around protest as a type of civic engagement. Relatedly, the relations between civics and politics make this item problematic for teachers who might be charged with indoctrination. The Liaisons recommend that this be referred to the Appropriations Committee, Academic Freedom, and CRE for policy guidance and recommendations. There are also implications for IPD, in the area of promoting civics lessons in anticipation of the approval of the civic seal.

California Music Education Association CREATE California is making inroads with various organizations to support expansion of “Teaching Artists”. There is a concern that they want to supplant, not supplement credentialed teachers.

Climate Change disproportionately affects low income communities who are least able to respond and recover. To that end, climate change education needs to be embedded in science classes. CSLA and KQED have collaborated to create and release a comprehensive online media literacy free resource page for K-12 educators including instructional materials, lesson plans and curriculum. CDE Media Literacy Resources Link.

INFORMATIONAL ITEMS ~ (Conferences)

- CAROCP conference will be held November 20-21, 2019 in Rancho Mirage.
- CCAE conference is April 24-25, 2020 in Sacramento.
- Spring CUE conference will be held March 19-21 in Palm Springs.
- The National CTE conference “Career TECH Vision” will be in Anaheim this year Dec 4-7, 2019.
- Annual CITEA conference will be March 20-21 at Palomar CC.
- California Reading Association’s 2020 Conference “Take Flight and Read”, will take place November 13-14, 2020 at the McClellan Conference Center in Sacramento. Call for Presenters and registration coming soon on their website.
- The California Association for Bilingual Education Conference will be held April 8-11, 2020. Visit https://cabe2020.gocabe.org/ to register and or/nominate an educator, administrator and/or para educator, parent or school.
- California Association of School Psychologist’s Spring Institute will be held March 19-20, 2020 at the Hyatt Regency, Sacramento
CTA BOARD OF DIRECTORS REPORT
STATE COUNCIL OF EDUCATION
OCTOBER 26-27, 2019
NEW BUSINESS ITEMS

NBI 10/19-1
CTA shall refer to the appropriate committee (could be an ad hoc committee) the
task of reviewing and revising our current charter school policy.

Rationale: Our current policy is outdated and lacking in current research about
the systematic effect of charter schools in California.

LTSP Area: Organizing Culture
LTSP Explanation: Charter schools are overwhelmingly nonunion and
therefore weaken our membership and represent an organizing challenge.
[Eric Swabeck (C&I)/Debbie Silverman Resnick (BUD)]

THE ABOVE ITEM WAS REFERRED TO THE NEGOTIATIONS
COMMITTEE

NBI 10/19-2
Move that CTA join the California Alliance for Retired Americans (CARA) as a
sustaining member.

Rationale: CARA is an organization made up of retired affiliates of labor and
community organizations throughout California. Membership is one million strong.
Their goals and values are consistent with CTA’s goals and values. Other
statewide sustaining member organizations include CFT, California Nurses,
CSEA, AFSCME, SEIU and California Labor Federation. CARA is an active
partner in passing the Schools and Communities First Initiative.

LTSP Area: Community Engagement
LTSP Explanation: CARA is in keeping with the provisions of the CTA Strategic
Plan as to building effective and authentic partnerships with parents, other unions
and community organizations.
[Ed Foglia (RET)/Bonnie Shatun (PIC)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF
DIRECTORS
NBI 10/19-3

CTA lobbyists will work with our legislators to use the Rainy Day Fund to pay down the debt for the pension obligation for STRS and CalPers

Rationale: A rainy day fund is to be used in times of uncertainty. Our LEAs across the state are paying large percentages of the pension liability. The LEAs did not create this debt, and the use of the rainy day fund for this purpose seems appropriate. Our legislators could provide more funding for our Local Control Funding Formula by providing additional financial support in alleviating the large percentages of payouts going to STRS and CalPERS

LTSP Area: Advocacy

LTSP Explanation: During this time of underfunding, our state has been putting money aside for a rainy day. Currently, our educators are struggling to live and work in their districts due to underfunding. By eliminating the large contributions LEAs make to our pension obligations, locals would have additional funding to negotiate and secure better class sizes, more services and better learning conditions for our students.

[Ann Katzburg (BUD)/Jordan Cummings (SSM)]

THE ABOVE ITEM WAS REFERRED TO THE RETIREMENT COMMITTEE
The School Safety and Management Committee will develop policy and recommended guidelines and procedures for school districts to follow in the event of fires, electrical outages and poor air quality.

**Rationale:** Currently there are no guidelines for districts to follow in regards to keeping our schools open during fire season. Our educators are required to go to work despite unhealthy conditions. Many of our members worked in conditions that led to health impairments. Our districts are not doing enough to protect our work environment. Additionally, there is a lack of communication and understanding on how to proceed during this "new normal". We need consistency and regulations to follow during the fire seasons we are encountering on a yearly basis - when to close schools, how to best communicate without electricity.

**LTSP Area:** Structure and Governance

**LTSP Explanation:** Our educators lose valuable sick time when we are faced with environmental conditions that lead to our own health impairments. Without clear guidelines to govern these current day circumstances, districts are guessing at when to close schools. We are also teaching without electricity during the energy shutdowns. We need to provide policy and guidelines on how to function, provide state flexibility for ADA and ensure that health and safety is a priority in our schools.

[Ann Katzburg (BUD)/Jordan Cummings (SSM)]

THE ABOVE ITEM WAS REFERRED TO THE SCHOOL SAFETY/SCHOOL MANAGEMENT COMMITTEE

That CTA provide the Women’s Caucus and the LGBTQ+ Caucus chairs the contact information for the members of the SCC Equity Teams that are part of their area of focus.

**Rationale:** Several members have requested more information from the groups they represent on the equity team. Providing their information to the caucus chairs will allow the caucuses to share their communication with those individuals on the equity team.

**LTSP Area:** Structure and Governance

**LTSP Explanation:** Members who are interested in helping lead their Service Centers need to have access to the information that the caucuses provide.

[Sonia Martin-Solis (REP)/Alberto Nodal (LNG)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS
NBI 10/19-6

I move that a portrait of Dr. Lois M. Tinson, the first ethnic minority president of the California Teachers Association be commissioned and put in the Dr. Lois M. Tinson Room at CTA Headquarters.

**Rationale:** CTA members and guests need to see who Dr. Tinson was and she needs the respect her legacy deserves.

**LTSP Area:** Leadership

**LTSP Explanation:** Future leaders of this Association, like our EMEID participants, need to know the history of the California Teachers Association and see the opportunities within.

[Rosenda Thomas (ECE)/Robert Ellis (SSM)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS

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NBI 10/19-7

I move that CTA hold a forum about joining the CA Labor Federation at the January, March or June 2020 State Council. I further move that CTA publicize to its locals how to join, and the benefits of joining, their local county labor federation.

**Rationale:** Labor is more effective united. The Labor Federation makes political endorsements across the state, including school board races, and mobilizes union members to support locals during job actions. Our union will be stronger and more influential as a member of the Labor Federation.

**LTSP Area:** Advocacy

**LTSP Explanation:** Joining the County Labor Federations will enable our members to educate other unions about education issues and bring them to our side.

[Ingrid Gunnell (PIC)/Cindy Monzon (PIC)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS

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That CTA replace the advertisements on the back of our union membership cards with the language used to invoke one’s Weingarten Rights.

**Rationale:** Our members, especially the newest members, need to maintain an awareness of their rights as Union employees and the benefits those rights bestow. Often one does not have appropriate wording available in the moment one is called to a meeting that begins to become disciplinary. Having our rights on the back of our Union cards enables us to easily carry them with us at all times. This action also makes a statement to our members of the priority with which we regard them over advertisers and other groups.

**LTSP Area:** Organizing Culture

**LTSP Explanation:** Part of organizing is defending the rights of our members. Enabling them to have ready access to some of their basic rights is fundamental to organizing and supporting them. This action would be a very useful reminder to them of why they are members of the Union.

[Eric Roudabush (SSM)/Ann Katzburg (BUD)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS

I, Monserrat Bonilla Flores, ask for Toby Boyd to publicly support DACA.

**Rationale:** Seeing that DACA is again in a difficult situation and many of our teachers and students are being affected, and will be affected, on the future supreme court decision. It is important for CTA to show its support.

**LTSP Area:** Advocacy

**LTSP Explanation:** This action will be advocating for the many students who are under-represented and puts teachers who are able to be employed because of DACA.

[Monserrat Bonilla Flores (ACT)/Kari Lee Reichert (ECE)]

THE EXECUTIVE OFFICERS RECOMMEND TO TAKE IMMEDIATE ACTION AND APPROVE
CTA will convene an independent panel of State Council Representatives to investigate allegations of any actions or slander by CTA Board Members meant to damage another member’s reputation.

**Rationale:** Our CTA Board Members are the representatives of our local areas. Recently there have been accusations that some Board Members are intentionally spreading rumors about other Board Members and State Council Members in order to ruin the reputation of those members and negatively impact their ability to do their work.

**LTSP Area:** Diversity - Social Justice

**LTSP Explanation:** We, as an organization, need to ensure that all voices are heard. No one should fear that our elected officials will damage their reputation because they do not agree with someone else’s viewpoints, do not back their preferred candidate or do not share their same ideas.

[Kimberly Lawrence (CPD)/Heather Mumy (SSM)]

**THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS**

That CTA implement a program to encourage the inclusion at CTA State Council of a greater diversity of types of positions that we represent such as nurses, counselors, adult education teachers, alternative education teachers, PE teachers, early education teachers and educational support professionals.

**Rationale:** The inclusion of the many types of members will make us both more effective and more unified.

**LTSP Area:** Organizing Culture

**LTSP Explanation:** Building an Organizing Culture

[Matthew Kogan (ACT)/Margarita Ortiz-Minett (ACT)]

**THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS**
NBI 10/19-12
CTA will explore actions to address the inequity of access to parents during disputed negotiations. Districts are able to send emails to parents giving their side of the negotiations meanwhile the local is dependent on word of mouth, social media, flyers.

Rationale: As a parent in Sacramento City Unified District I get regular updates from the district of their position and their perspective. Yet SCTA has to depend on social media, flyers, and word-of-mouth. If a parent only reads the district’s position, they have a skewed and incomplete understanding of what ALL the issues and concerns are. This whittles at the public’s support for the teachers. We need to level the playing field.

LTSP Area: Community Engagement
LTSP Explanation: This allows our family communities to be involved and be informed about the reality of what is happening.

[Alexandra Condon (TEAF)/Robert Lynch (ECE)]

THE ABOVE ITEM WAS REferred TO THE NEGOTIATIONS COMMITTEE

NBI 10/19-13
CTA will add ACR 117 Gang Awareness and Prevention for All (GAP4ALL) to the CTA calendar and use existing resources to publicize this addition.

Rationale: Putting it on the calendar will help members know about this new resolution.

LTSP Area: Community Engagement
LTSP Explanation: Helps bring our community together.

[Shane Parmely (PIC)/Mark Murray (FPE)]

THE ABOVE ITEM WAS REFERRED TO THE COMMUNICATIONS COMMITTEE
NBI 10/19-14

CTA will create training modules for staff to take to members on empowering / advocating for Special Education/Inclusive Practices language in the LCAP.

**Rationale:** Local chapters need a tool-kit and trainers to all to get that representation in the LCAP in order to better advocate for our members and students.

**LTSP Area:** Advocacy

**LTSP Explanation:** This will enable us to better advocate for our members and students.

[Wendy Eccles (PIC)/Pasquale Mazzulli (FPE)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS

NBI 10/19-15

I move that CTA sponsor the ANCA Western Region March and Rally for Justice on April 24th, 2020.

**Rationale:** The state of CA recognizes the Armenian Genocide, and has included it in state social studies standards. CA has the largest Armenian population outside of Armenia and it is important that we, as educators, stand in solidarity with our students and communities.

**LTSP Area:** Diversity - Social Justice

**LTSP Explanation:** It is important to understand past atrocities and genocides in order to educate and advocate for racial and social justice.

[Ingrid Gunnell (PIC)/David Platt (CRE)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS
NBI 10/19-16

CTA will use an independent investigator to look into the handling of the firing of the Executive Director and report back to State Council in March.

**Rationale:** The firing of the Executive Director, on the newly elected President’s first day of the July board meeting, created rumors that have spread widely which make it appear it could be retaliation for the outcome of the Presidential election. Since State Council is the decision making body of CTA there needs to be transparency. A report that can be shared needs to be made to State Council outlining any improprieties, procedural violations or lack of due process in the firing.

**LTSP Area:** Structure and Governance

**LTSP Explanation:** CTA has specific rules and procedures in place regarding our structure and organization. CTA has a long-standing commitment to a strong system of representational democracy. In order to retain that strong representational democracy, there must be transparency in actions taken by our Board of Directors, and our members need to be assured that they will not face retribution for their actions, words, or stances on matters before the body.

[Kimberly Lawrence (CPD)/Pasquale Mazzulli (FPE)]

**THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS**

NBI 10/19-17

That CTA create policy to recognize county PACs formed by CTA locals and allow them to be eligible for ABC funding.

**Rationale:** Current CTA policy allows for endorsement in County School Board elections, this will allow CTA to provide funding to support PAC efforts to elect their endorsed candidates. This will better enable us to elect County BOE members who will respect the local school board decisions.

**LTSP Area:** Advocacy

**LTSP Explanation:** The local county chapter is often too small to take on such a big election with so many voters. By banding together to protect the decisions of many local school boards, a county PAC can be more successful.

[Stephanie Tellez (BUD)/Karen Ridley (PIC)]

**THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS**
We would like to see CTA publicize the Dolores Huerta Day on April 10th and encourage all members to conduct exercises remembering the life of Dolores Huerta, recognizing her accomplishments and familiarizing pupils with the contributions she made to California.

**Rationale:** AB2644 designates April 10 of each year as Dolores Huerta Day. On this day, the Legislature encourages all public schools and educational institutions to conduct exercises remembering the life of Dolores Huerta, recognizing her accomplishments and familiarizing pupils with the contributions she made to California. We need to ensure our students learn about this phenomenal woman.

**LTSP Area:** Community Engagement

**LTSP Explanation:** This helps promote our support of individuals standing up and fighting for social justice. Furthermore, her actions of standing up for education and walking hand in hand with striking teachers demonstrate her commitment to issues that matter to our organization.

*David Cuestas (CRE)/Kelly Villalobos (REP)*

**THE EXECUTIVE OFFICERS RECOMMEND TO TAKE IMMEDIATE ACTION AND APPROVE**
That the CTA Educator Magazine run an article on the topic of the Fiscal Crisis Management and Assistance (FCMAT) based on an examination of the agency's operations and its effect on teachers and students for the purpose of educating the membership.

Rationale: The Fiscal Management Assistance Team (FCMAT) is a non-elected, private, public all financed body that exercises its authority with little public knowledge or oversight. FCMAT in effect has had veto power over the financial decisions of many school districts, including Inglewood, West Contra Costa, Oakland, Compton, Vallejo, and other k-12 and community college districts. These financial decisions can affect the contracts and working conditions of teachers and other personnel in those districts.

LTSP Area: Advocacy

LTSP Explanation: The Fiscal Management Assistance Team (FCMAT) is a non-elected, private, public all financed body that exercises its authority with little public knowledge or oversight. FCMAT in effect has had veto power over the financial decisions of many school districts, including Inglewood, West Contra Costa, Oakland, Compton, Vallejo, and other k-12 and community college districts. These financial decisions can affect the contracts and working conditions of teachers and other personnel in those districts.

[Chaz Garcia (LNG)/Ismael Armendariz (SEC)]

THE ABOVE ITEM WAS REFERRED TO THE COMMUNICATIONS COMMITTEE
NBI 10/19-20

I move that CTA lobbyists will work with our legislators to ensure that School Psychologists have a 1 to 500-700 ratio per National Association of School Psychologist Standards.

**Rationale:** CHILD FIND laws legally mandates that it is a legal requirement for schools to find children who have disabilities and need services. Districts often sparely employ school psychologists with upwards in the 1-3000 ratio range. It is our moral obligation to support and care for these students and we are not able to do so without set appropriate ratios. We also have students with SERIOUS mental health problems and they need support not only for themselves, but also for the community.

**LTSP Area:** Transforming Our Profession

**LTSP Explanation:** Fair Ratios allow school psychologists to adhere to Child Find laws.

[Jasmine Zartman (alternate) (RET)/Jackie Nedft (CRE)]

THE ABOVE ITEM WAS REFERRED TO THE STUDENT SUPPORT SERVICES COMMITTEE
That CTA change the "Cesar E. Chavez Memorial Education Award" to reflect the contributions of Dolores Huerta, Co-founder of the United Farm Workers (UFW) and civil rights activist, such as, the "Cesar E. Chavez and Dolores Huerta Education Award." Announce this change at the Hispanic Observance and invite Dolores Huerta.

Rationale: Historical circumstances were such that actions and work of females, in particular Hispanic females, were attributed to men. It is time to enhance our historical record and include those individuals, who have been left out of the historical narrative, this 100th year of the Women's Suffragette movement. Let us recognize Dolores Huerta, UFW co-founder and civil rights activist who embodies all the principles represented in the "Cesar E. Chavez Memorial Education Award." California recognizes April 10th as Dolores Huerta Day; it is time for CTA to recognize Dolores, who fought alongside Cesar and has been instrumental in the labor movement.

LTSP Area: Diversity - Social Justice

LTSP Explanation: Recognizing the accomplishments of individuals who have historically been left out the historical narrative due to their sex or color is a social justice issue. We must increase the diversity of our historical record.

[Susan Garcia (CRE)/Alberto Nodal (LNG)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS
CTA will endorse and promote the 2020 Black Lives Matter (BLM) at School Week of Action, specifically calling for efforts to demonstrate support for the demands of the BLM Week of Action at School: Implementing restorative justice practices. Hiring and mentoring Black educators. Advocating for ethnic studies to be taught in preK-12.

**Rationale:** The 2019 NEA Representative Assembly overwhelmingly voted to adopt a new business item that calls for NEA to promote the 2020 Black Lives Matter Week of Action as a way to further begin to dismantle institutional racism. CTA should demonstrate its commitment to the implementation of this NBI at the state level. Furthermore, acknowledging and promoting this week will demonstrate CTA’s commitment to supporting the Black Lives Matter movement in a tangible, student-centered, action-based way.

**LTSP Area:** Diversity - Social Justice

**LTSP Explanation:** This is racial justice equity work.

[Cecily Myart-Cruz (CRE)/Taunya Jaco (CRE)]

THE EXECUTIVE OFFICERS RECOMMEND TO TAKE IMMEDIATE ACTION AND APPROVE
To cap district superintendents' salaries making those salaries commensurate with the teacher salaries in the district, as well as reflecting the economic environment of the surrounding community.

**Rationale:** District superintendents' salaries and their support staff are local taxpayer dollars. The majority of that money when applied to education as directed by school boards should be to support students' learning and their well-being. By capping superintendents' salaries, this would ensure that school boards would guarantee that local tax dollars are being used for their intended purpose of supporting students, as well are in proportion to the district salary schedule and reflective of the current economic conditions of the surrounding communities.

**LTSP Area:** Diversity - Social Justice

**LTSP Explanation:** This is a moral and ethical issue when you have a superintendent that makes a significant amount of money far above the mean income of the students' families that live within the confines of a school district. It is a moral obligation to ensure that as much funding as possible be used for the betterment of the students in any district, than padding a district officials' pockets. It is not asking much to require a percentage be applied on district superintendents' salaries that keeps it proportionate to the teachers who teach in that respective district. In Ontario-Montclair, there is a superintendent who makes $685,000.00 a year in salary and benefits. That is almost 500% more than the highest earning teacher, and is not reflective of the economic environment in the community. This is money that could be put to better use by serving students than going to one individual.

[John Egan (ACT)/Tracy Taylor (STL)]

THE ABOVE ITEM WAS REFERRED TO THE CTA BOARD OF DIRECTORS
STATE LEGISLATION COMMITTEE

Kathy Sharp, Chairperson
Erich Myers, Vice Chairperson
TBD, Board Liaison
Charlotte Svolos, Recorder
Lori Easterling, Consultant
Toni Trigueiro, Consultant

MAJOR POLICY – Immediate Action (2/3rd Vote Required)
A. None

MAJOR POLICY – First Reading (or – Second Reading)
A. None

OTHER ITEMS FOR IMMEDIATE ACTION
A. INTERIM POSITIONS TAKEN SINCE MAY 16, 2019 (interim positions have been approved and are informational only.)

Watch AB 1214 Melendez (R-67) 5/22/19
School employees: training: cardiopulmonary resuscitation

Requires a school district, county office of education, or charter school to offer a course in cardiopulmonary resuscitation (CPR) to allow school staff and teachers to participate in CPR training; requires a school district or charter school electing to offer any interscholastic athletic program to provide personnel with a valid certification of CPR training to be present at the athletic program’s on-campus activities at all times; and prohibits a school district or charter school from requiring personnel not otherwise required by law or the bylaws of the California Interscholastic Federation to hold a valid certification of CPR training to obtain training to comply with an individual program of professional growth including CPR training, unless it has been negotiated as part of a collective bargaining process.

This position has been approved by Ryan Ruelas, Chair of the Credentials and Professional Development Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Support AB 381 Reyes (D-47) 6/4/19
Postsecondary education: sexual assault and sexual violence prevention training: intimate partner and dating violence

Adds domestic violence centers to the existing on-campus and community-based organizations with which governing boards should enter into memoranda of understanding, agreements, or collaborative partnerships; and includes provisions the outreach programming required would include informing students about specified topics relating to intimate partner and dating violence, and specifies incoming graduate, international, and transfer students be included in the definition of incoming students for the purposes of who is provided outreach programming.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support AB 1000 Cervantes (D-60) 6/4/19
Student Safety

Requires the governing board of a community college district, the Trustees of the California State University, the Board of Directors of the Hastings College of the Law, and the Regents of the University of California, if the regents make it applicable by appropriate resolution to review and update the written procedure or protocols relating to sexual assault each academic year in collaboration with sexual assault counselors and student, faculty, and staff representatives.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support AB 1345 McCarty (D-7) 6/4/19
Private postsecondary education: California Private Postsecondary Education Act of 2009

Prohibits an institution from providing financial incentives to any person, including a student, involved in student recruitment, enrollment, continued enrollment, admission, attendance, or involved in awarding of financial aid based on the enrollment of a student, or in the sales of any education materials based on succeeding in those activities.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Support  AB 1346  Medina (D-61)  6/4/19
Postsecondary education: California Private
Postsecondary Education Act of 2009: Student Tuition
Recovery Fund

Expands the definition of economic loss to include all amounts paid by the student to a
postsecondary institution, any amounts paid in connection with attending the institution, and all
principal, interest, and charges of any kind for any loan incurred by the student to pay these
amounts.

This position has been approved by Edward Gomez, Chair of the Community College Association
Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  AB 1645  Rubio (D-48)  6/4/19
Student support services: Dreamer Resource Liaisons

Requires the California Community Colleges and the California State University (CSU), and
requests the University of California (UC), to designate a Dreamer Resource Liaison on each of
their respective campuses to assist students meeting specified requirements, including
undocumented students, by streamlining access to all available financial aid, social services, state-
funded immigration legal services, internships, externships, and academic opportunities.

This position has been approved by Edward Gomez, Chair of the Community College Association
Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  SB 173  Dodd (D-3)  6/4/19
CalFresh: postsecondary student eligibility: workstudy

Requires the California State Department of Social Services to create a standardized form to be
used by community colleges and universities to verify workstudy eligibility of students who are
approved and anticipate participating in state or federal workstudy; and requires community
colleges and universities to distribute the form to all students approved for state or federal
workstudy; and to provide information required to complete that form.

This position has been approved by Edward Gomez, Chair of the Community College Association
Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Support SB 354 Durazo (D-24) 6/4/19
California DREAM Loan Program: graduate degree programs

Expands DREAM loan-eligibility to a student who is enrolled in a program of study leading to a professional or graduate degree, including, but not limited to, a teaching credential, if the student meets other applicable qualifications.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support SB 461 Roth (D-31) 6/4/19
Student financial aid: Cal Grants: summer term students

Creates eligibility for financial aid for a total of two summer terms of up to nine units of enrollment, or the quarter equivalent, per term for purposes of pursuing timely completion of a baccalaureate degree at a public postsecondary educational institution for students who are already eligible to receive a Cal Grant A award or Cal Grant B award; and specifies Summer Cal Grant awards shall not be subject to or count against the 4 years of full-time attendance eligibility limitation for purposes of Cal Grant A award and Cal Grant B award renewals.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support SB 575 Bradford (D-35) 6/4/19
Cal Grants: student eligibility

Repeals the prohibition in the Cal Grant A, B, or C Category Program for a student who is incarcerated from being eligible to receive a Cal Grant award.

This position has been approved by Edward Gomez, Chair of the Community College Association Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Watch

AB 8
Chu (D-25)
6/6/19

Pupil health: mental health professionals

Requires on or before December 31, 2024 all public schools to have at least one mental health professional for every 600 pupils generally accessible to pupils on campus during school hours; requires on or before December 31, 2024, all public schools with fewer than 600 pupils to have at least one mental health professional generally accessible to pupils on campus during school hours, to employ at least one mental health professional to serve multiple schools, or to enter into a memorandum of understanding with a county agency or organization to provide services to pupils; requires schools to seek reimbursement for costs of implementing the bill’s provisions through the Local Education Agency Medi-Cal Billing Option and the School-Based Medi-Cal Administrative Activities program; requires at least one of the mental health professionals shall hold a services credential with a specialization in pupil personnel services; and by 2029, all mental health professionals shall hold a services credential with a specialization in pupil personnel services.

This position has been approved by Allan Roberts, Chair of the Student Support Services Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support

AB 1172
Frazier (D-11)
6/6/19

Special education: nonpublic, nonsectarian schools or agencies

Requires a contracting local educational agency (LEA) to pay the nonpublic, nonsectarian school or agency any applicable fees for individuals with exceptional needs who are enrolled in programs provided contractually; requires a nonpublic, nonsectarian school or agency to verify the administrator holds or is obtaining an administrative credential with an accredited postsecondary educational institution in its certification application; requires an LEA entering a master contract with a nonpublic, nonsectarian school to conduct at least one onsite monitoring visit during each school year; requires the State Department of Education (CDE) to establish and publish criteria reporting the monitoring visits to CDE; requires the nonpublic, nonsectarian school or agency to notify CDE and the LEA with the master contract of any student-involved incident at the school or agency when law enforcement or child protective services are involved; requires CDE to suspend or revoke the certification of the nonpublic, nonsectarian school or agency if the health or safety of a student is jeopardized; requires a qualified behavior analyst onsite during school hours if the school or agency serves students with significant behavioral needs or who are on behavioral intervention plans; and requires a nonpublic, nonsectarian school to certify in writing to the State Superintendent of Public Instruction that it provides annual training to staff with contact with students during the school day.

This position has been approved by Roberta Kreitz, Chair of the Special Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Support  AB 1219  Jones-Sawyer (D-59)  6/6/19
Teacher credentialing: certificated employee assignment monitoring

Repeals provisions of teacher assignment monitoring in existing law and requires the California Commission on Teacher Credentialing to administer a State Assignment Accountability System to provide local educational agencies and charter schools with a data system for annual assignment monitoring.

This position has been approved by Ryan Ruelas, Chair of the Credentials and Professional Development Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Oppose  SB 219  Portantino (D-25)  6/6/19
Special education: individuals with exceptional needs

Starting in the 2019-2020 school year, requires school districts and charter schools to admit a child to a transitional kindergarten program who have a 5th birthday after December 2, but during the school year if the child has exceptional needs; establishes the Special Education Early Intervention Grant Program authorizing the Superintendent of Public Instruction to allocate $4,000 per child who is 3 or 4 years of age, has exceptional needs, and is receiving a majority of special education and related services in the regular education program including transitional kindergarten; and prohibits a school district from admitting a child meeting the definition of an individual with exceptional needs into the regular education program if admittance violates the child's individualized education program.

This position has been approved by Paula Merrigan, Chair of the Early Childhood Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  AB 1606  Gray (D-21)  6/10/19
University of California: school of medicine: San Joaquin Valley Regional Campus Medical Education Endowment Fund

Closes a tax loophole which allows gambling losses to be deducted from state income taxes.

This position has been approved by Jodi Dayberry, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
<table>
<thead>
<tr>
<th>Bill</th>
<th>Sponsor</th>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Support</strong> AB 91 Burke (D-62) 6/18/19</td>
<td>Income taxation: Loophole Closure and Small Business and Working Families Tax Relief Act of 2019</td>
<td>Includes provisions of federal tax conformity, providing $1.7 billion for the 2019-20 budget as well as the Earned Income Tax Credit. This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.</td>
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<tr>
<td><strong>Support</strong> AB 217 Burke (D-62) 6/18/19</td>
<td>Income taxation: credits: exclusions: federal conformity</td>
<td>Includes provisions of federal tax conformity, providing $1.7 billion for the 2019-20 budget as well as the Earned Income Tax Credit. This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.</td>
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<tr>
<td><strong>Support</strong> SB 268 Wiener (D-11) 6/18/19</td>
<td>Ballot measures: local taxes</td>
<td>Expands transparency regarding local tax measures by addressing a ballot label requirement for government bonds and tiered tax rate measures by allowing technical information on tiered tax rates, the authorization of a bond, or a tax with a rate structure to be included in the voter guide to give the proper description and context of issues that should be considered by voters. This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee. Political Involvement Committee is secondary and was consulted regarding the interim position.</td>
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<tr>
<td><strong>Watch</strong> AB 1593 Reyes (D-47) 6/19/19</td>
<td>Personal income taxes: earned income credit</td>
<td>Requires a taxpayer and qualifying child to have a social security number or a federal individual taxpayer identification number in order to be eligible for the earned income tax credit. This bill is being considered as part of the California State Budget. This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.</td>
<td></td>
</tr>
</tbody>
</table>
Support  SB 614  Rubio (D-22)  6/26/19
Teacher credentialing: reading instruction

Repeals the Reading Instruction Competence Assessment (RICA) and related requirements and provides that the RICA is not required for the issuance of a teaching credential.

This position has been approved by Ryan Ruelas, Chair of the Credentials and Professional Development Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Oppose  AB 610  Obernolte (R-33)  6/27/19
Elections: local bond measures: tax rate statement

Requires the estimated tax rate increase of a local bond measure to be expressed per one thousand dollars in the tax rate statement in the Voter Information Guide.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Oppose  AB 1437  Chen (R-55)  6/27/19
Local government: redevelopment: revenues from property tax override rates

Allows a property tax increment to be used for paramedic programs in the City of Brea and other cities wishing to utilize this scheme, leaving less for local school districts.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Oppose  AB 1442  Rivas (D-39)  6/27/19
Income taxes: credits: Share Our Values Tax Credit

Adds an additional movie tax credit between 2020 and 2026, up to five percent of qualified expenditures for a total statewide amount of $100 million to qualified taxpayers who relocate their motion picture in California from a state criminalizing or restricting a woman’s access to abortion services.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Budget Act of 2019 provides statutory allocations for public education and public pensions. The state budget is the single most important piece of legislation to fund public schools.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  
SB 76  
Committee on Budget and Fiscal Review  
6/28/19  
Education finance: constitutional minimum funding obligation: inflation and cost-of-living adjustments

Implements the Proposition 98 provisions of the 2019-20 budget; provides necessary statutory changes to enact the 2019-20 budget related to TK-14 education; and clarifies changes made to the certification and continuous appropriation of the Proposition 98 Guarantee.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  
SB 77  
Committee on Budget and Fiscal Review  
6/28/19  
Higher education trailer bill

Implements the higher education provisions of the 2019-20 budget and is the single most important measure to fund higher education in California.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.

Support  
SB 90  
Committee on Budget and Fiscal Review  
6/28/19  
Public employees’ retirement

Implements additional funding provided to the California State Teachers’ Retirement System (CalSTRS) and the California Public Employment Retirement System (CalPERS); provides additional funding to ease school district contributions to both CalSTRS and CalPERS; and provides additional state payments to both CalSTRS and CalPERS to address both systems unfunded obligations.

This position has been approved by Grant Schuster, Chair of the Financing Public Education Committee, as well as by Kathy Sharp, Chair of the State Legislation Committee.
Support  AB 1727  Weber (D-79)  9/10/19  
Community colleges: career development and college preparation courses

This bill allows funding determination for career development and college preparation (CDCP) courses to be calculated based on either ongoing attendance counts or census data counts.

This position has been approved by Eric Kalumagi, Chair of the Community College Association, as well as by Kathy Sharp, Chair of the State Legislation Committee.
COMMITTEE RECOMMENDATIONS

1. None

REFERRALS TO THE BOARD OF DIRECTORS

A. Request to conduct training of new legislative subcommittee chairs and consultants at 2020 January State Council

MATTERS PENDING

1. None

INFORMATIONAL ITEMS

1. The State Legislation Committee opened nominations for the vacancy of Recording Secretary and unanimously elected Charlotte Svolos for 2019-20.

2. 2019-20 New State Legislative Committee Liaison Assignments:

   Adult, Alternative, Career & Technical Education  James Sutter
   Assessment & Testing                                Michael Sterling
   Civil Rights in Education                          Maya Walker/Laura Anderson
   Community College Association                     Billie Joe Wright/Ed Gomez
   Credentials & Professional Development            Christie Bettendorf
   Curriculum & Instruction                          Sheila Whitley
   Early Childhood Education                         Georgia Flowers Lee
   Financing Public Education                        Paula Orbaugh
   Language Acquisition                              Scott Mullin/ Katherine Rojas-Kirby
   Negotiations                                      Claire Merced-Robles
   Political Involvement                             Tracy Taylor
   Professional Rights & Responsibilities           Julie Shankle
   Retirement                                       Jordan Horowitz
   School Safety/School Management                   Samantha Weiss
   Special Education                                 Kelly Flores/Brenda Walker
   Student Support Services                          Nancy Glenn
   Teacher Evaluation & Academic Freedom             David Feldman

   Roving Liaisons: Kathy Sharp, Erich Myers, Charlotte Svolos, and Board Liaison (tbd)
LEGISLATIVE TERMS:

Amend:
To alter formally by modification, deletion, or addition.

Appropriation:
A legislative authorization to make expenditures and incur obligations for specific governmental purposes; usually limited as to time when it may be expended. One of the prime responsibilities of the Legislature is this power to appropriate moneys.

Companion Bill:
Two bills identical in wording that are introduced in each house. They will most likely not have the same number. Some companion bill sponsors feel it will increase the chances for the passage of the bill.

Legislative Deadlines:
Deadline set by a legislative body for specified action, such as bill introduction, committee action, or initial passage of bills by either house.

Effective Date:
The date a bill, once passed, becomes law. Unless a different date is specified, bills become law when approved.

Floor:
Reference to the interior of the chamber of either house. Floor action suggests consideration by the Assembly or Senate rather than committee action.

Held in Committee:
The defeat of a measure by the decision of a standing committee not to return it to the full house for further consideration.

Pull:
The act of removing a specific legislative bill from an inclusive list for the purpose of review, discussion, change a position, etc.

Reconsideration:
A motion that, if carried, allows a measure that failed or passed to be heard again in committee or on the Floor. This more commonly occurs when a bill has failed passage on third reading on the floor where the author/presenter will “notice reconsideration” upon the final tally of the votes. However, it does occasionally happen during the committee process as well.

Resolution:
A measure expressing the will, wish, or direction of the Legislature. It does not have the effect of law.

Resolution-Concurrent Resolution:
A resolution which requests action or states the Legislature’s position on an issue.
Resolution-Memorial Resolution:
A nonsubstantive resolution used to convey the sympathy and condolences of the Legislature on the passing of a constituent or a dignitary.

Spot Bill:
A spot bill is a proposal not fully developed or containing sufficient information necessary to make a determination to support or suppose.

Sunset Law:
A provision shutting off a program or agency on a specific date, requiring reexamination and a fresh authorization prior to that date to continue.

Urgency:
An urgency measure goes into effect immediately once passed by both houses and signed by the Governor. This type of measure requires a 2/3 vote.

Veto:
A power vested in the governor to prevent the enactment of measures passed by the Legislature by returning them, with objections, to the Legislature.

*CAPITOL SPEAK: For those unfamiliar to the legislative process, phrases used can appear to be from a different language. The inclusion of Capitol Speak descriptions below are provided to assist you in understanding the legislative arena.

Across the desk:
When a bill or amendment is officially introduced. Common to hear staffers or third house members ask: “Is that across the desk yet?”

Blue pencil:
The governor’s line-item veto. Dreaded by legislators hoping to protect spending priorities.

District bill:
Legislation addressing a specific local or district issue of the legislator carrying the bill. If approved, legislation applicable in the district only.

Dog House:
The Legislature’s smallest office, located on the sixth floor and generally assigned to an Assembly member who has angered leadership.

Free Ride:
To run for a different office when your current elected position is not up for re-election. If you lose, you retain your current elected position.

Gut and Amend:
To hollow out an existing bill and fill it with new language. A good way to sneak in new (or old, previously defeated) bills late in a session.
Hijack:
To insert an existing legislative measure into a new bill. For example, transplanting a legislative measure authored by a member of one political party into a different legislative measure by a member of a different political party and claiming ownership.

Interim Study:
A common tactic to kill bills without the messiness of a vote. Rather than vote against a legislative measure, legislature decide to study it more – after the session ends.

“I wasn’t going to speak today”:
The most common sentence lawmakers say before they begin to speak.

Job killer:
Description of legislative measures identified by the California Chamber of Commerce, Republicans and moderate Democrats as adversely impacting the creation, availability, and duration of employment opportunities in CA. (Typically affixed to priorities of organized labor, environmentalists, and other Democratic allies.

Juice Committee:
Committee that oversees wealthy or politically potent industries. Membership guarantees a steady revenue of campaign contributions

Jungle primary:
Derisive nickname for the top-two primaries, in which top two vote getters advance to general election regardless of political party.

Lay off:
To avoid voting on a controversial bill. Effectively the same as a no vote, for purposes of passing a bill but can look better politically. Synonym for “take a walk.” A practice more associated with political moderates of either political party.

May revision (or the ungrammatical “May revise”):
Common term for governor’s May budget proposal. Unlike the January budget proposal, it reflects new tax revenue (April 15 tax submission deadline) and therefore offers the starting point for serious budget talks.

Mod:
A moderate Democrat. Friendly to business interests and irritant to Democratic leadership.

On call:
When the voting roll remains open after an initial count falls short of the needed number for passage, the bill is on call.

Per Diem session:
Typically held on Fridays before a holiday weekend, these often-brief floor sessions fulfill the requirement to meet every three days which allows legislators to keep their tax-free $168-a-day “per diem” stipend.

Poison pill:
An amendment added to a bill so it will become indefensible and die.
Robust:
The only type of debate that occurs in the Legislature.

Roll (verb):
If you get a bill out of committee whose chair opposes it, you have “rolled” the chair. A good way to lose your committee membership.

Speakerize:
When the Assembly speaker intervenes on a controversial bill either to kill it or to ensure it advances.

Sponsor:
An outside entity that writes a bill and then gets a legislator to carry the bill. Not always “candid” about its role.

Spot bill:
A placeholder bill that remains devoid of detail until a legislator decides content.

Stakeholder:
Anyone who wants something. Always seem to be meeting somewhere about something. Generally, synonym for “interest group.”

Suspense File:
Holding place for legislation that will cost more than a specified amount of money. Many bills never make if off the Appropriations Suspense file. Another useful way to let a bill quietly die.

Third house:
Sacramento’s lobbying corps, so named because some see them – and the special interests they’re paid to represent – as a coequal third branch of the Legislature.

Trailer bill:
Legislation that implements a specific part of the budget after the budget itself has passed. A useful way to change policy via the budget process.

Two-year bill:
A bill that stalls in the first year of the legislative session and must wait another year.

Urgency clause:
A designation that makes a bill take effect immediately after it is signed instead of the following Jan. 1. Requires a two-thirds vote.

Work the floor:
When a legislator moves from desk to desk in the Assembly or Senate to talk to colleagues to garner support.

*Special acknowledgment to Sacramento Bee reporters Jeremy White and Alexei Koseff for their contributions.
**CTA Scholarship for Dependent Children/Del A. Weber Scholarship**

This program offers up to 35 scholarships, of up to $5,000 each, to a dependent child of an active member of CTA, CTA/NEA-Retired or a deceased CTA member.

The Del A. Weber Scholarship program offers one scholarship, of up to $5,000, to a dependent child of an active member of CTA, CTA/NEA-Retired or a deceased CTA member, who is attending or attended a continuation high school or an alternative education program.

- One scholarship is provided in Honor of Ralph J. Flynn and is awarded to the highest-scoring applicant.
- One scholarship is provided in Honor of Ruthie Fagerstrom and is awarded to the second highest-scoring applicant.
- One scholarship is provided in Honor of Susan B. Anthony and is awarded to the third highest-scoring applicant.

**CTA Scholarship for Members**

This program offers up to five scholarships, of up to $3,000 each, to active members of CTA completing college coursework.

- One scholarship is designated as the American Indian/Alaska Native Memorial Scholarship in Honor of Alice Piper and is awarded to the highest-scoring member applicant.
- One scholarship is designated for an ESP member who wants to transition into the teaching profession, provided an ESP member applies.

**Student CTA (SCTA) Scholarship in Honor of L. Gordon Bittle**

This program offers up to three scholarships, of up to $5,000 each, to active members of Student CTA (SCTA) who have demonstrated high academic achievement.

- One scholarship is designated as the Pacific Asian American Scholarship in Honor of Philip Vera Cruz and is awarded to the highest scoring SCTA applicant.

**LGBTQ+ Safety in Schools Grant and Scholarship Program in Honor of Guy DeRosa**

The program provides grants to support LGBTQ+ groups, projects and presentations that promote understanding and respect for LGBTQ+ persons, in addition to scholarships for self-identified LGBTQ+ members enrolled in a teacher/counseling credential or graduate program who are pursuing a career in public education and who understand the importance of LGBTQ+ educators as role models.

**CTA Human Rights Awards**

A variety of Human Rights Awards are given annually to CTA members, chapters and Service Center Councils to promote the development of programs for the advancement and protection of human and civil rights within the Association.

**CTA César E. Chávez Memorial Education Awards Program**

This awards program provides recognition for educators and their students who demonstrate an understanding of the vision and guiding principles by which César Chávez lived his life. The recipients, both students and sponsoring CTA members, will receive up to $550 (exact amount will be determined by the Awards committee). Their work will be recognized by posting visual art and written essays online and in various CTA publications.

**Martin Luther King Jr. Memorial Scholarship**

The Martin Luther King Jr. Memorial Scholarship Program encourages ethnic minority students to become educators, school nurses, school counselors or school therapists and to promote professional growth for ethnic minority teachers and ESP members.
4.03.2020

John Swett Awards for Media Excellence

Named after the founder of CTA, the John Swett Awards are CTA’s highest honor for media professionals, and recognize outstanding coverage of education.

These are critical dates for the John Swett Awards:

**January 1 to December 31, 2019**
All media nominations must have appeared during this 12-month period.

**April 3, 2020 (Nomination Deadline)**
Deadline for receipt of nominations and supportive material at CTA headquarters. Nominations may be made by any CTA chapter or Service Center Council. Late entries will not be accepted.

For more information visit [www.cta.org/awards](http://www.cta.org/awards).