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## Return of Organization Exempt From Income Tax

OMB No 1545-0047

2011

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2011 calendar year, or tax year beginning 2011, and ending 20

## B Check if applicable

☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

C Name of organization  
CALIFORNIA FEDERATION OF TEACHERS AFT 8004

D Employer identification number  
94-1271864

E Telephone number  
(818) 843-8226

G Gross receipts \$ 23,226,311.

H(a) Is this a group return for affiliates? ☐ Yes ☒ No  
H(b) Are all affiliates included? ☐ Yes ☐ No  
If "No," attach a list (see instructions)

H(c) Group exemption number 0787

I Tax-exempt status ☐ 501(c)(3) ☒ 501(c)(5) (insert no ) 4947(a)(1) or 527

J Website WWW.CFT.ORG

K Form of organization ☐ Corporation ☐ Trust ☒ Association ☐ Other L Year of formation 1919 M State of legal domicile CA

## Part I Summary

1 Briefly describe the organization's mission or most significant activities  
SEE SCHEDULE O

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3 Number of voting members of the governing body (Part VI, line 1a) 3 26.

4 Number of independent voting members of the governing body (Part VI, line 1b) 4 23.

5 Total number of individuals employed in calendar year 2011 (Part V, line 2a) 5 60.

6 Total number of volunteers (estimate if necessary) 6 0

7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0

7b Net unrelated business taxable income from Form 990-T, line 34 7b 0

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	85,599.	0
9 Program service revenue (Part VIII, line 2g)	19,762,398.	22,175,649.
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	13,632.	6,547.
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	863,761.	1,044,115.
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	20,725,390.	23,226,311.
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	338,946.	590,794.
14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	7,174,922.	11,562,781.
16a Professional fundraising fees (Part IX, column (A), line 11)	0	0
b Total fundraising expenses (Part IX, column (D), line 25)	0	0
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	15,230,964.	11,865,817.
18 Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)	22,744,832.	24,019,392.
19 Revenue less expenses Subtract line 18 from line 12	-2,019,442.	-793,081.

	Beginning of Current Year	End of Year
20 Total assets (Part X, line 16)	20,334,512.	23,068,207.
21 Total liabilities (Part X, line 26)	26,757,040.	30,283,816.
22 Net assets or fund balances Subtract line 21 from line 20	-6,422,528.	-7,215,609.

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here ☒ Signature of officer ☒ Date 11/15/12

☒ Signature of preparer ☐ Date

Type or print name and title  
Kenneth R. Holmer - Secretary/Treasurer

Paid Preparer Use Only

Print/Type preparer's name KENNETH R. HOLMER, CPA Preparer's signature Kenneth R. Holmer CPA Date 11/9/12 Check ☐ if self-employed PTIN P00178726

Firm's name MILLER KAPLAN ARASE LLP Firm's EIN 95-2036255

Firm's address 4123 LANKERSHIM BLVD, NORTH HOLLYWOOD, CA 91602-2828 Phone no 818-769-2010

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2011)

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response to any question in this Part III ☒ **X****1** Briefly describe the organization's mission

SEE SCHEDULE O

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported**4a** (Code \_\_\_\_\_) (Expenses \$ \_\_\_\_\_ including grants of \$ \_\_\_\_\_) (Revenue \$ \_\_\_\_\_)

SEE SCHEDULE O

**4b** (Code \_\_\_\_\_) (Expenses \$ \_\_\_\_\_ including grants of \$ \_\_\_\_\_) (Revenue \$ \_\_\_\_\_)**4c** (Code \_\_\_\_\_) (Expenses \$ \_\_\_\_\_ including grants of \$ \_\_\_\_\_) (Revenue \$ \_\_\_\_\_)**4d** Other program services (Describe in Schedule O )

(Expenses \$ \_\_\_\_\_ including grants of \$ \_\_\_\_\_) (Revenue \$ \_\_\_\_\_)

**4e** Total program service expenses ►

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A . . . . .		X
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? . . . . .		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II . . . . .		
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III . . . . .		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I . . . . .		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II . . . . .		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III . . . . .		X
9 Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV . . . . .		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V . . . . .		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI . . . . .	X	
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII . . . . .		X
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII . . . . .		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX . . . . .	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X . . . . .	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X . . . . .	X	
12 a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII . . . . .		X
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional . . . . .	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .		X
14 a Did the organization maintain an office, employees, or agents outside of the United States? . . . . .		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV . . . . .		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Parts II and IV . . . . .		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Parts III and IV . . . . .		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions) . . . . .		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II . . . . .		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III . . . . .		X
20 a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H . . . . .		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i> . . . . .	<b>21</b> X	
<b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i> . . . . .	<b>22</b> X	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i> . . . . .	<b>23</b> X	
<b>24 a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25.</i> . . . . .	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .	<b>24b</b>	X
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .	<b>24c</b>	X
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .	<b>24d</b>	X
<b>25 a</b> <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i> . . . . .	<b>25a</b>	
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i> . . . . .	<b>25b</b>	
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i> . . . . .	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i> . . . . .	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .	<b>28a</b>	X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .	<b>28b</b>	X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i> . . . . .	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i> . . . . .	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i> . . . . .	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i> . . . . .	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i> . . . . .	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1.</i> . . . . .	<b>34</b> X	
<b>35 a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .	<b>35a</b>	X
<b>b</b> Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i> . . . . .	<b>35b</b>	X
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i> . . . . .	<b>36</b>	
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i> . . . . .	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .	<b>38</b> X	

Form 990 (2011)

**Part V** Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response to any question in this Part V. ☐

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. <span style="float: right;">45</span>		
<b>b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. <span style="float: right;">0</span>		
<b>c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. <span style="float: right;">60</span>		
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	X	
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.		
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
<b>b</b>	If "Yes," enter the name of the foreign country: _____ See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
<b>c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year. <span style="float: right;">7d</span>		
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the organization make any taxable distributions under section 4966?		
<b>b</b>	Did the organization make a distribution to a donor, donor advisor, or related person?		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12. <span style="float: right;">10a</span>		
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. <span style="float: right;">10b</span>		
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders. <span style="float: right;">11a</span>		
<b>b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them). <span style="float: right;">11b</span>		
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year. <span style="float: right;">12b</span>		
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.		
<b>b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. <span style="float: right;">13b</span>		
<b>c</b>	Enter the amount of reserves on hand. <span style="float: right;">13c</span>		
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year?		X
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.		

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response to any question in this Part VI. ☒ X

**Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	26	
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent.	23	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?	3	X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
<b>6</b> Did the organization have members or stockholders?	6	X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body?	8a	X
<b>b</b> Each committee with authority to act on behalf of the governing body?	8b	X
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O.	9	X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates?	10a	X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	X
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13.	12a	X
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done.	12c	X
<b>13</b> Did the organization have a written whistleblower policy?	13	X
<b>14</b> Did the organization have a written document retention and destruction policy?	14	X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official.	15a	X
<b>b</b> Other officers or key employees of the organization.	15b	X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed. \_\_\_\_\_
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☐ Own website ☐ Another's website ☒ Upon request
- 19** Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization. **ELIZABETH SOTO, 2550 N HOLLYWOOD WAY #400, BURBANK, CA 91505-5088 818-843-8226**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response to any question in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) CATHY CAMPBELL VICE PRESIDENT	5.00	X						0	0	0
(2) MARTY HITTLEMAN PRESIDENT	40.00	X		X				92,975.	0	65,701.
(3) KIMBERLY CLAYTOR VICE PRESIDENT	5.00	X						0	0	0
(4) L. LACY BARNES SENIOR VICE PRESIDENT	5.00	X						0	0	0
(5) VELMA J. BUTLER CCE PRESIDENT	5.00	X						27,153.	0	0
(6) WARREN FLETCHER VICE PRESIDENT	5.00	X						0	0	0
(7) BETTY FORRESTER VICE PRESIDENT	5.00	X						0	0	0
(8) ROSA MARIA GARCIA VICE PRESIDENT	5.00	X						0	0	0
(9) LINDA SNEED VICE PRESIDENT	5.00	X		X				1,300.	0	0
(10) CARL FRIEDLANDER CCC PRESIDENT	20.00	X						70,262.	0	0
(11) MARY ALICE CALLAHAN SENIOR VICE PRESIDENT	5.00	X						0	0	0
(12) MIKI GORAL VICE PRESIDENT	5.00	X						0	0	0
(13) ZWI REZNIK VICE PRESIDENT	5.00	X						0	0	0
(14) DENNIS KELLY VICE PRESIDENT	5.00	X						0	0	0



**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
15) JIM MAHLER VICE PRESIDENT	5.00	X						0	0	0
16) FRANCISCO RODRIGUEZ VICE PRESIDENT	5.00	X		X				0	0	0
17) GARY RAVANI EC/K-12 PRESIDENT	5.00	X						95,660.	0	0
18) LAURA RICO VICE PRESIDENT	5.00	X						0	0	0
19) KENT WONG VICE PRESIDENT	5.00	X						0	0	0
20) DENNIS SMITH SECRETARY-TREASURER	40.00	X		X				64,408.	0	64,559.
21) MELINDA DART VICE PRESIDENT	5.00	X						0	0	0
22) DAVID YANCEY VICE PRESIDENT	5.00	X						0	0	0
23) MARK HOULE VICE PRESIDENT	5.00	X		X				0	0	0
24) ELAINE MERRIWEATHER VICE PRESIDENT	5.00	X						0	0	0
25) DEAN MURAKAMI VICE PRESIDENT	5.00	X						0	0	0
<b>1b Sub-total</b>								191,690.	0	65,701.
<b>c Total from continuation sheets to Part VII, Section A</b>								1,076,051.	0	1,450,067.
<b>d Total (add lines 1b and 1c)</b>								1,267,741.	0	1,515,768.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **25**

- 3 Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual . . . . .
- 4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual . . . . .
- 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person . . . . .

	Yes	No
3		X
4	X	
5		X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
26) JOSH PECHTHALT PRESIDENT	40.00	X		X				46,761.	0	125,418.
27) SAM RUSSO VICE PRESIDENT	5.00	X		X				0	0	0
28) LUUKIA SMITH VICE PRESIDENT	5.00	X						0	0	0
29) BOB SAMUELS UC/AFT PRESIDENT	5.00	X						0	0	0
30) CAROLYN ISHIDA VICE PRESIDENT	5.00	X						0	0	0
31) ALISSA MESSER VICE PRESIDENT	5.00	X						0	0	0
32) JEFFERY FREITAS SECRETARY-TREASURER	40.00	X		X				156,773.	0	208,665.
33) RAY GAER VICE PRESIDENT	5.00	X						0	0	0
34) DAVID MIELKE VICE PRESIDENT	5.00	X						0	0	0
35) JOANNE WADDELL VICE PRESIDENT	5.00	X						0	0	0
36) CARL WILLIAMS VICE PRESIDENT	5.00	X						0	0	0
<b>1b Sub-total</b> .....										
<b>c Total from continuation sheets to Part VII, Section A</b> .....										
<b>d Total (add lines 1b and 1c)</b> .....										

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **25**

- 3** Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual .....
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual .....
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person .....

	Yes	No
<b>3</b>		X
<b>4</b>	X	
<b>5</b>		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **2**

**Part VII**    **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

[illegible]

2	Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization	25
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		Yes	No
3	Did the organization list any <b>former</b> officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> . . . . .		X
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> . . . . .	X	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> . . . . .		X

## Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ►

**Part VIII Statement of Revenue**

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	1a	Federated campaigns . . . . .	1a			
	b	Membership dues . . . . .	1b			
	c	Fundraising events . . . . .	1c			
	d	Related organizations . . . . .	1d			
	e	Government grants (contributions) . . . . .	1e			
	f	All other contributions, gifts, grants, and similar amounts not included above . . . . .	1f			
	g	Noncash contributions included in lines 1a-1f \$ . . . . .				
	h	<b>Total.</b> Add lines 1a-1f . . . . .		0		
<b>Program Service Revenue</b>	2a	PER CAPITA TAXES	Business Code 900099	22,175,649.	22,175,649.	
	b					
	c					
	d					
	e					
	f	All other program service revenue . . . . .				
	g	<b>Total.</b> Add lines 2a-2f . . . . .		22,175,649.		
	<b>Other Revenue</b>	3	Investment income (including dividends, interest, and other similar amounts) . . . . .		6,547.	
4		Income from investment of tax-exempt bond proceeds . . . . .		0		
5		Royalties . . . . .		0		
		(i) Real	(ii) Personal			
6a		Gross rents . . . . .				
b		Less rental expenses . . . . .				
c		Rental income or (loss) . . . . .				
d		Net rental income or (loss) . . . . .		0		
		(i) Securities	(ii) Other			
7a		Gross amount from sales of assets other than inventory . . . . .				
b		Less cost or other basis and sales expenses . . . . .				
c		Gain or (loss) . . . . .				
d		Net gain or (loss) . . . . .		0		
8a		Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18 . . . . .	a			
b		Less direct expenses . . . . .	b			
c		Net income or (loss) from fundraising events . . . . .		0		
9a		Gross income from gaming activities See Part IV, line 19 . . . . .	a			
b		Less direct expenses . . . . .	b			
c	Net income or (loss) from gaming activities . . . . .		0			
10a	Gross sales of inventory, less returns and allowances . . . . .	a				
b	Less cost of goods sold . . . . .	b				
c	Net income or (loss) from sales of inventory . . . . .		0			
<b>Miscellaneous Revenue</b>			<b>Business Code</b>			
11a	REIMBURSEMENTS	900099	337,013	337,013.		
b	AFFILIATE FUNDING PROGRAM	900099	653,085.	653,085.		
c	ALL OTHER	900099	54,017.	54,017.		
d	All other revenue . . . . .					
e	<b>Total.</b> Add lines 11a-11d . . . . .		1,044,115.			
12	<b>Total revenue.</b> See instructions . . . . .		23,226,311.	23,219,764.	6,547.	

**Part IX. Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Check if Schedule O contains a response to any question in this Part IX. . . . .

**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21.	475,794.			
2 Grants and other assistance to individuals in the United States. See Part IV, line 22.	115,000.			
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16.	0			
4 Benefits paid to or for members.	0			
5 Compensation of current officers, directors, trustees, and key employees.	1,019,635.	<b>501(c)(5) organization electing not to complete columns (B), (C) and (D).</b>		
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0			
7 Other salaries and wages.	4,589,491.			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).	4,631,101.			
9 Other employee benefits.	946,700.			
10 Payroll taxes.	375,854.			
11 Fees for services (non-employees):				
a Management.	0			
b Legal.	162,813.			
c Accounting.	95,600.			
d Lobbying.	0			
e Professional fundraising services. See Part IV, line 17.	0			
f Investment management fees.	0			
g Other.	6,471.			
12 Advertising and promotion.	0			
13 Office expenses.	330,219.			
14 Information technology.	42,143.			
15 Royalties.	0			
16 Occupancy.	670,480.			
17 Travel.	677,867.			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.	0			
19 Conferences, conventions, and meetings.	360,969.			
20 Interest.	44,198.			
21 Payments to affiliates.	7,861,819.			
22 Depreciation, depletion, and amortization.	36,177.			
23 Insurance.	150,759.			
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a COMMUNICATIONS & PUBLICATION.	370,054.			
b RELEASE TIME.	47,961.			
c GOVERNMENTAL RELATIONS.	51,754.			
d ORGANIZING EXPENSES.	33,930.			
e All other expenses.	922,603.			
25 Total functional expenses. Add lines 1 through 24e.	24,019,392.			
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).	0			

**Part X** Balance Sheet

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash - non-interest-bearing	262,287.	1	533,545.
	2 Savings and temporary cash investments	1,819,542.	2	2,024,597.
	3 Pledges and grants receivable, net	0	3	0
	4 Accounts receivable, net	3,668,396.	4	4,809,441.
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L	0	5	0
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)	0	6	0
	7 Notes and loans receivable, net	0	7	0
	8 Inventories for sale or use	0	8	0
	9 Prepaid expenses and deferred charges	4,500.	9	52,988.
	10a Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 522,180.		
	b Less accumulated depreciation	10b 480,720.	51,643.	10c 41,460.
	11 Investments - publicly traded securities	0	11	0
	12 Investments - other securities See Part IV, line 11	0	12	0
	13 Investments - program-related See Part IV, line 11	0	13	0
	14 Intangible assets	0	14	0
	15 Other assets See Part IV, line 11	14,528,144.	15	15,606,176.
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	20,334,512.	16	23,068,207.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses	543,924.	17	699,495.
	18 Grants payable	0	18	0
	19 Deferred revenue	0	19	0
	20 Tax-exempt bond liabilities	0	20	0
	21 Escrow or custodial account liability Complete Part IV of Schedule D	0	21	0
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable to unrelated third parties	946,844.	24	0
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D	25,266,272.	25	29,584,321.
	26 <b>Total liabilities.</b> Add lines 17 through 25	26,757,040.	26	30,283,816.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	27 Unrestricted net assets	-6,422,528.	27	-7,215,609.
	28 Temporarily restricted net assets	0	28	0
	29 Permanently restricted net assets	0	29	0
	<b>Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 <b>Total net assets or fund balances</b>	-6,422,528.	33	-7,215,609.
34 <b>Total liabilities and net assets/fund balances</b>	20,334,512.	34	23,068,207.	

Form 990 (2011)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response to any question in this Part XI. ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12) . . . . .	<b>1</b>	23,226,311.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25) . . . . .	<b>2</b>	24,019,392.
<b>3</b>	Revenue less expenses Subtract line 2 from line 1 . . . . .	<b>3</b>	-793,081.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .	<b>4</b>	-6,422,528.
<b>5</b>	Other changes in net assets or fund balances (explain in Schedule O) . . . . .	<b>5</b>	0
<b>6</b>	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B)) . . . . .	<b>6</b>	-7,215,609.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response to any question in this Part XII. ☐

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .		X
<b>b</b>	Were the organization's financial statements audited by an independent accountant? . . . . .	X	
<b>c</b>	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . . . If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	X	
<b>d</b>	If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .		
<b>b</b>	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Form **990** (2011)

SCHEDULE D  
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2011

Open to Public  
Inspection

Department of the Treasury  
Internal Revenue Service

▶ Complete if the organization answered "Yes," to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number

94-1271864

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year . . . . .		
2 Aggregate contributions to (during year) . . . . .		
3 Aggregate grants from (during year) . . . . .		
4 Aggregate value at end of year . . . . .		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No	

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

<input type="checkbox"/> Preservation of land for public use (e g , recreation or education)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Tax Year
a Total number of conservation easements . . . . .	2a
b Total acreage restricted by conservation easements . . . . .	2b
c Number of conservation easements on a certified historic structure included in (a) . . . . .	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register . . . . .	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? . . . . . ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? . . . . . ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 . . . . . ▶ \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X . . . . . ▶ \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenues included in Form 990, Part VIII, line 1 . . . . . ▶ \$ \_\_\_\_\_

b Assets included in Form 990, Part X . . . . . ▶ \$ \_\_\_\_\_

For Paperwork Reduction Act Notice, see the Instructions for Form 990

Schedule D (Form 990) 2011



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition      d ☐ Loan or exchange programs  
 b ☐ Scholarly research      e ☐ Other \_\_\_\_\_  
 c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . . ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
c Beginning balance . . . . .	1c
d Additions during the year . . . . .	1d
e Distributions during the year . . . . .	1e
f Ending balance . . . . .	1f

2a Did the organization include an amount on Form 990, Part X, line 21? . . . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance . . . . .					
b Contributions . . . . .					
c Net investment earnings, gains, and losses . . . . .					
d Grants or scholarships . . . . .					
e Other expenditures for facilities and programs . . . . .					
f Administrative expenses . . . . .					
g End of year balance . . . . .					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %  
 b Permanent endowment ▶ \_\_\_\_\_ %  
 c Temporarily restricted endowment ▶ \_\_\_\_\_ %

The percentages in lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

- (i) unrelated organizations . . . . .  
 (ii) related organizations . . . . .

	Yes	No
3a(i)		
3a(ii)		
3b		

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? . . . . .

4 Describe in Part XIV the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land . . . . .				
b Buildings . . . . .				
c Leasehold improvements . . . . .				
d Equipment . . . . .		522,180.	480,720.	41,460.
e Other . . . . .				

**Total.** Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . . . ▶ 41,460.

**Part VII Investments - Other Securities.** See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
<b>Total</b> (Column (b) must equal Form 990, Part X, col (B) line 12.)		

**Part VIII Investments - Program Related.** See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
<b>Total</b> (Column (b) must equal Form 990, Part X, col (B) line 13.)		

**Part IX Other Assets.** See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) PENSION BENEFIT ASSETS -	
(2) MANAGEMENT/F.R.U.	15,400,830.
(3) RENTAL DEPOSITS	53,197.
(4) INVESTMENTS - CAL MESA OFFICE	
(5) BUILDING	152,149.
(6)	
(7)	
(8)	
(9)	
(10)	
<b>Total</b> (Column (b) must equal Form 990, Part X, col (B) line 15.)	

15,606,176.

**Part X Other Liabilities.** See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes ATTACHMENT 1	
(2) ACCRUED SALARIES, VACATION &	
(3) SICK TIME	520,816.
(4) PENSION BENEFITS LIABILITY -	
(5) MANAGEMENT/F.R.U. - FUNDED	15,400,830.
(6) PENSION BENEFITS LIABILITY -	
(7) MANAGEMENT/F.R.U. - UNFUNDED	8,376,521.
(8) O.P.E.I.U. POSTRETIREMENT MEDICAL	
(9) BENEFITS LIABILITY	1,488,767.
(10) POSTRETIREMENT MEDICAL BENEFITS	
(11) LIABILITY - MANAGEMENT/F.R.U	2,017,574.
<b>Total</b> (Column (b) must equal Form 990, Part X, col (B) line 25.)	

29,584,321.

2. FIN 48 (ASC 740) Footnote. In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740)

**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net) Add lines 4 through 8	9	
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	10	

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)	5	

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)	5	

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

THE ORGANIZATION HAS ADOPTED GUIDANCE ON ACCOUNTING FOR UNCERTAINTY IN

INCOME TAXES ISSUED BY THE FINANCIAL ACCOUNTING STANDARDS BOARD.

MANAGEMENT BELIEVES THAT THE ORGANIZATION HAS TAKEN NO UNCERTAIN TAX

POSITIONS THAT REQUIRE ADJUSTMENT TO THE FINANCIAL STATEMENTS IN ORDER TO

COMPLY WITH THE PROVISIONS OF THIS GUIDANCE. INFORMATION RETURNS FILED

BY THE ORGANIZATION ARE SUBJECT TO EXAMINATION BY AUTHORITIES.

**Part XIV** Supplemental Information (continued)ATTACHMENT 1SCHEDULE D, PART X - OTHER LIABILITIESDESCRIPTIONBOOK VALUE

FINANCIAL ASSISTANCE PAYABLE

1,779,813.

TOTALS

29,584,321.

SCHEDULE I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No 1545-0047

2011

Open to Public  
Inspection

Name of the organization

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number

94-1271864

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States ☐

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. ☐  
Part II can be duplicated if additional space is needed

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	EARLY CHILDHOOD FEDERATION 2550 N HOLLYWOOD WAY #400 BURBANK, CA 91505			25,000		BOOK	N/A	ORGANIZING GRANT
(2)	UNIVERSITY COUNCIL-AFT 11728 WILSHIRE BL LOS ANGELES, CA 90025			190,794.		BOOK	N/A	ORGANIZING GRANT
(3)	AMERICAN FED OF TEACHERS 555 NEW JERSEY AVE NW WASHINGTON, DC 20001			260,000.		BOOK	N/A	ORGANIZING GRANT
(4)								
(5)								
(6)								
(7)								
(8)								
(9)								
(10)								
(11)								
(12)								

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

3 Enter total number of other organizations listed in the line 1 table

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Schedule I (Form 990) (2011)

Schedule I (Form 990) (2011)

**Part III** Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22  
Part III can be duplicated if additional space is needed

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1 SCHOLARSHIPS	39.	115,000.		BOOK	N/A
2					
3					
4					
5					
6					
7					

**Part IV** Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

ORGANIZING GRANTS ARE GIVEN TO VARIOUS AFFILIATES FOR THE PURPOSE OF INCREASING MEMBERSHIP. THE ORGANIZATION WORKS CLOSELY WITH THOSE RECEIVING THE GRANTS. SCHOLARSHIPS ARE GIVEN TO WELL DESERVING HIGH SCHOOL STUDENTS TO ASSIST THEM IN PURSUING THEIR COLLEGE EDUCATION.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 23

▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

**2011**

**Open to Public Inspection**

Name of the organization

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number

94-1271864

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

**3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director. Explain in Part III.

- |  |   |
|--|---|
| <input type="checkbox"/> Compensation committee              | <input checked="" type="checkbox"/> Written employment contract                     |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                               |
| <input type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- |  |           |   |
|--|-----------|---|
| <b>a</b> Receive a severance payment or change-of-control payment?                             | <b>4a</b> | X |
| <b>b</b> Participate in, or receive payment from, a supplemental nonqualified retirement plan? | <b>4b</b> | X |
| <b>c</b> Participate in, or receive payment from, an equity-based compensation arrangement?    | <b>4c</b> | X |
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5-9.**

**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- |                                    |           |  |
|------------------------------------|-----------|--|
| <b>a</b> The organization?         | <b>5a</b> |  |
| <b>b</b> Any related organization? | <b>5b</b> |  |
- If "Yes" to line 5a or 5b, describe in Part III.

**6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- |                                    |           |  |
|------------------------------------|-----------|--|
| <b>a</b> The organization?         | <b>6a</b> |  |
| <b>b</b> Any related organization? | <b>6b</b> |  |
- If "Yes" to line 6a or 6b, describe in Part III.

**7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III.

**8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

**9** If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b

2

4a

4b

4c

5a

5b

6a

6b

7

8

9

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Schedule J (Form 990) 2011

Schedule J (Form 990) 2011

Page 2

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported as deferred in prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 MARTY HITTLEMAN	(i) 92,975.	0	0	64,236.	1,465.	158,676.	0
	(ii) 0	0	0	0	0	0	0
2 JOSH PECHTHALT	(i) 46,761.	0	0	122,905.	2,513.	172,179.	0
	(ii) 0	0	0	0	0	0	0
3 JOSEPH L. HOOPER	(i) 141,206.	0	0	187,161.	26,821.	355,188.	0
	(ii) 0	0	0	0	0	0	0
4 JANE HUNDERTMARK	(i) 146,979.	0	0	187,430.	25,923.	360,332.	0
	(ii) 0	0	0	0	0	0	0
5 JULIEN MINARD	(i) 150,485.	0	0	187,568.	32,067.	370,120.	0
	(ii) 0	0	0	0	0	0	0
6 DOLORES SANCHEZ	(i) 137,590.	0	0	187,000.	13,344.	337,934.	0
	(ii) 0	0	0	0	0	0	0
7 KAREN CURTIS	(i) 136,189.	0	0	186,999.	17,112.	340,300.	0
	(ii) 0	0	0	0	0	0	0
8 JEFFERY FREITAS	(i) 156,773.	0	0	187,822.	20,843.	365,438.	0
	(ii) 0	0	0	0	0	0	0
9	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
10	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
11	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
12	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
13	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
14	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
15	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0
16	(i) 0	0	0	0	0	0	0
	(ii) 0	0	0	0	0	0	0

Schedule J (Form 990) 2011

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18-04770

PAGE 23



Schedule J (Form 990) 2011

Page **3**

**Part III** Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Schedule J (Form 990) 2011

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18-04770

PAGE 24

**SCHEDULE O**  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

Name of the organization

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

**2011**

**Open to Public  
Inspection**

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number

94-1271864

PART I, LINE 1, PART III, LINE 1 AND LINE 4A:

TO ORGANIZE THE EDUCATIONAL EMPLOYEES OF CALIFORNIA INTO LOCALS CHARTERED  
BY THE AMERICAN FEDERATION OF TEACHERS (THE "AFT"), AND TO BRING THEM  
INTO RELATIONS OF MUTUAL ASSISTANCE AND COOPERATION; TO OBTAIN FOR THEM  
ALL THE RIGHTS AND BENEFITS TO WHICH THEY ARE ENTITLED: TO RAISE THE  
STANDARDS OF THE EDUCATIONAL PROFESSION AND TO SECURE CONDITIONS  
ESSENTIAL TO THE BEST PROFESSIONAL SERVICE; AND TO PROMOTE SUCH  
DEMOCRATIZATION OF THE EDUCATIONAL INSTITUTIONS AS WILL ENABLE THEM  
BETTER TO EQUIP THEIR STUDENTS TO TAKE THEIR PLACES IN THE ECONOMIC,  
SOCIAL AND POLITICAL LIFE OF THE COMMUNITY; TO STRIVE FOR EQUAL  
EDUCATIONAL OPPORTUNITIES FOR ALL; AND TO INITIATE AND SUPPORT STATE  
LEGISLATION TO BENEFIT STUDENTS AND EDUCATIONAL EMPLOYEES OF THE STATE OF  
CALIFORNIA.

PART VI, LINE 4:

THE ORGANIZATION AMENDED ITS CONSTITUTION AND BY-LAWS IN 2011.

PART VI, LINES 6, 7A AND 7B:

THE ORGANIZATION HAS MEMBERS AT LARGE, EACH OF WHICH SIGN A MEMBERSHIP  
CARD. ALL OTHER MEMBERS OF THE AMERICAN FEDERATION OF TEACHERS IN  
CALIFORNIA ARE ALSO MEMBERS OF LOCAL UNIONS, EACH OF WHICH IS AFFILIATED  
WITH THE ORGANIZATION.

Name of the organization

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number

94-1271864

OFFICERS ARE ELECTED AT THE ANNUAL CONVENTION BY VOTE OF AFFILIATED MEMBERS.

PER CAPITA RATES, THE ANNUAL BUDGET AND POLITICAL ENDORSEMENTS ARE APPROVED AT THE ANNUAL CONVENTION, THE STATE COUNCIL, OR AT THE EXECUTIVE COUNCIL.

PART VI, LINE 11B:

FOR 990 WAS DISTRIBUTED TO ALL OF THE ORGANIZATION OFFICERS AND REVIEWED DURING AN EXECUTIVE COUNCIL MEETING BEFORE IT WAS FILED.

PART VI, LINE 12C:

OFFICERS ARE REQUIRED TO NOTIFY THE ORGANIZATION OF ANY CHANGES IN THEIR INTERESTS THAT COULD GIVE RISE TO CONFLICTS.

PART VI, LINES 15A AND 15B:

COMPENSATION TO OFFICERS AND KEY EMPLOYEES ARE APPROVED BY THE EXECUTIVE COUNCIL.

PART VI, LINE 19:

THE ORGANIZATION'S BY-LAWS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS ARE MAINTAINED IN THE ORGANIZATION'S OFFICE AND ARE AVAILABLE UPON REQUEST.

**SCHEDULE R**  
**(Form 990)**Department of the Treasury  
Internal Revenue Service**Related Organizations and Unrelated Partnerships**▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.  
▶ Attach to Form 990 ▶ See separate instructions

OMB No 1545-0047

**2011**Open to Public  
Inspection

Name of the organization

CALIFORNIA FEDERATION OF TEACHERS AFT 8004

Employer identification number  
94-1271864**Part I Identification of Disregarded Entities** (Complete if the organization answered "Yes" to Form 990, Part IV, line 33.)

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) -----					
(2) -----					
(3) -----					
(4) -----					
(5) -----					
(6) -----					

**Part II Identification of Related Tax-Exempt Organizations** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) CALIFORNIA FEDERATION OF TEACHERS COPE 93-1032682 2550 N HOLLYWOOD WAY STE 400 BURBANK, CA 91505-5008	POLITICAL	CA	527	N/A	N/A		X
(2) CALIFORNIA FED. OF TEACHERS LEGAL DEF. 51-0188170 2550 N HOLLYWOOD WAY STE 400 BURBANK, CA 91505-5008	LEGAL DEFENSE	CA	501(C)(5)	N/A	N/A		X
(3) -----							
(4) -----							
(5) -----							
(6) -----							
(7) -----							

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Schedule R (Form 990) 2011

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18-04770

PAGE 27

Schedule R (Form 990) 2011

**Part III** Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-JBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?	(k) Percentage ownership
							Yes	No			
(1) -----											
(2) -----											
(3) -----											
(4) -----											
(5) -----											
(6) -----											
(7) -----											

**Part IV** Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
(1) WESTERN STATES INSURANCE TRUST 2550 N HOLLYWOOD WAY STE 400 BURBANK, CA 91505-5088 95-3382455	INSURANCE TRUST	CA	N/A	TRUST	4,929.	1,023.	100.0000
(2) -----							
(3) -----							
(4) -----							
(5) -----							
(6) -----							
(7) -----							

Schedule R (Form 990) 2011

Part V Transactions With Related Organizations (Complete if the organization answered "Yes" to Form 990, Part IV, line 34, 35, 35a, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a Receipt of (i) interest (ii) annuities (iii) royalties or (iv) rent from a controlled entity
- b Gift, grant, or capital contribution to related organization(s)
- c Gift, grant, or capital contribution from related organization(s)
- d Loans or loan guarantees to or for related organization(s)
- e Loans or loan guarantees by related organization(s)
- f Sale of assets to related organization(s)
- g Purchase of assets from related organization(s)
- h Exchange of assets with related organization(s)
- i Lease of facilities, equipment, or other assets to related organization(s)
- j Lease of facilities, equipment, or other assets from related organization(s)
- k Performance of services or membership or fundraising solicitations for related organization(s)
- l Performance of services or membership or fundraising solicitations by related organization(s)
- m Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)
- n Sharing of paid employees with related organization(s)
- o Reimbursement paid to related organization(s) for expenses
- p Reimbursement paid by related organization(s) for expenses
- q Other transfer of cash or property to related organization(s)
- r Other transfer of cash or property from related organization(s)

If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

	(a) Name of other organization	(b) Transaction type (a-r)	(c) Amount involved	(d) Method of determining amount involved
(1)	CALIFORNIA FEDERATION OF TEACHERS COPE	M, N, P	92,434.	ALLOCATION
(2)	CALIFORNIA FED. OF TEACHERS LEGAL DEF FUND	M, N		N/A
(3)	WESTERN STATES INSURANCE TRUST	M, N, P	7,000.	ALLOCATION
(4)				
(5)				
(6)				

**Part VI** **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" on Form 990, Part IV, line 37.)

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under section 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1) -----													
(2) -----													
(3) -----													
(4) -----													
(5) -----													
(6) -----													
(7) -----													
(8) -----													
(9) -----													
(10) -----													
(11) -----													
(12) -----													
(13) -----													
(14) -----													
(15) -----													
(16) -----													

**Part VII** **Supplemental Information**

Complete this part to provide additional information for responses to questions on Schedule R (see instructions).

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# CFT Constitution & Bylaws

California Federation  
of Teachers

AFT, AFL-CIO

A Union of Professionals



May 25, 2011

# CFT Constitution & By-Laws

## Contents

### Constitution

Name .....	1
Objectives .....	1
Membership .....	1
Officers .....	1
State Council .....	2
Executive Council .....	3
Procedures for Amending .....	3

### By-Laws

Conventions .....	4
Finance .....	7
Rules .....	11
Procedures for Amending .....	11

## Contents: Alphabetical by Topic

Amendment .....	3	Name .....	1
Constitution, By Convention .....	3	Objectives .....	1
Constitution, By Referendum .....	3	Officers .....	1
Constitution, By Vote of Locals .....	4	Duties .....	1
By-Laws .....	4	Elections .....	1
Committees .....	1	Offices .....	1
Community College Council .....	2	President .....	1
Convention .....	4	Recall .....	2
Alternates .....	6	Secretary Treasurer .....	1
Annual Meetings .....	4	Vacancies .....	1
Committees .....	7	Vice President, AFT .....	3
Councils of Locals .....	4	Vice President, Senior .....	1
Credentials .....	5	Vice Presidents .....	1
Delegates .....	5	Per capita .....	7
Delegate Allocation .....	5	Agency Fee Non-Members .....	7
Determining Average Membership .....	5	Calculations .....	8
Distribution of Votes .....	5	Classes of Membership .....	7
Ex-Officio Delegates .....	5	Delinquency .....	9
Members-at-Large .....	5	Reports .....	8
Nominations and Elections .....	6	Special Assessments .....	9
Quorum .....	6	Staff Funding Program .....	9
Resolutions .....	6	Rules .....	11
Roll Call Vote .....	6	Staff Funding Program .....	9
Roll Call Voting Strength .....	5	State Council .....	2
COPE Fund .....	8	Duties and Responsibilities .....	2
Council of Classified Employees .....	2	Meetings .....	3
Early Childhood/K-12 Council .....	2	Membership .....	2
Employees .....	3	Purpose .....	2
Executive Council .....	3	Quorum .....	3
Legal Defense Fund .....	8	Special Operating Rules .....	3
Membership .....	1	Travel Reimbursement .....	10
Chartered Locals .....	1	Young .....	3
Members-At-Large .....	1	University Council .....	2
Retired Members .....	1		

# Constitution

## ARTICLE I: *Name*

This organization shall be known as the California Federation of Teachers (CFT).

## ARTICLE II: *Objectives*

The aims of this organization shall be to organize the educational and health care employees of California into locals chartered by the American Federation of Teachers (AFT); to bring them into relations of mutual assistance and cooperation; to obtain for them all the rights and benefits to which they are entitled, to raise the standards of their professions and to secure the conditions essential to the best professional service; to promote such democratization of the educational institutions as will enable them better to equip their students to take their places in the economic, social and political life of the community; to strive for equal educational opportunities for all; to initiate and support state legislation to benefit the students, and educational and health care employees of the state of California

## ARTICLE III: *Membership*

### Section 1. Chartered Locals

This organization shall consist of locals of AFT members chartered in California by the American Federation of Teachers. This organization shall consist of public and private school educational employees, educational workers, nurses, allied health professionals, other health-care employees and other workers.

### Section 2. Members-At-Large

There shall be a class of members-at-large, which shall consist of members who work in locales where there is not a CFT local jurisdiction. These members will have full membership rights and privileges.

### Section 3. Retired Members

Active members who retire from their present positions shall be admitted as CFT retiree members (without paying any per capita) and without CFT voting rights except as provided in Article I, Section 7b of the By-Laws, but with the right to participate in benefit programs such as insurance, travel and discount buying services.

## ARTICLE IV: *Officers*

### Section 1. Elected Officers

- a. Officers shall be elected in odd-numbered years by the annual convention for a term of two years. Nominations shall be made from the floor of the convention. Voters may cast votes in support

of as many candidates for an office as they wish, and a majority of the votes cast shall be required for election to office. If more than one candidate receives a majority of the votes cast for an office, the candidate with the most votes is elected.

- b. The term of office for officers elected at a convention shall commence sixty (60) days immediately following the convention.
- c. The elected officers of the CFT shall be a president, a secretary-treasurer, and twenty-four vice-presidents.
- d. The twenty-four vice-presidents shall elect a Senior Vice President from their body at an Executive Council meeting following the convention. The tenure of the Senior Vice President shall be co-terminus with the office of the President.
- e. The delegates to the conventions of the California Labor Federation, AFL-CIO and the American Federation of Teachers must be elected at the CFT Convention.

### Section 2. Duties of Officers

- a. President: The President shall be the chief executive officer of the CFT. It shall be the President's duty to administer all the affairs of the Federation and to implement policies of the Federation as determined by the convention and the State Council. The President shall have the power to appoint the chairpersons of all committees and shall have the power to remove committee chairpersons subject to the approval of the Executive Council.
- b. Senior Vice President: It shall be the specific responsibility of the Senior Vice President to take the place of the President in case of incapacitation or if the office of the President is vacated. Other responsibilities may be assigned by the President or the Executive Council.
- c. Vice Presidents: It shall be the specific responsibility of the Vice Presidents to further the organization of AFT locals in the state and to remain in contact with a specific number of locals on a regular basis. Other responsibilities may be assigned by the President or the Executive Council.
- d. Secretary-Treasurer: The Secretary-Treasurer shall be responsible for administering the financial policies of the Federation as determined by the State Council and Convention. Other responsibilities may be assigned by the President or the Executive Council. The Secretary-Treasurer shall work under the direction of the President.

### Section 3. Elections

- a. Vacancies
  - 1) President. If the President resigns office, becomes incapacitated or cannot complete the term of office, the Senior Vice-President shall serve as President until the next regularly scheduled convention. At this convention an election shall be conducted to fill the vacancy for the unexpired term of office.
  - 2) If the Senior Vice President cannot or will not serve as President, the Executive Council shall elect a President who shall

serve until the next regularly scheduled convention

- 3) If the Senior Vice President becomes President, the Executive Council shall elect a new Senior Vice President for the unexpired term of office.
- 4) Secretary-Treasurer: In the event this office is vacated the Executive Council shall appoint a Secretary-Treasurer for the unexpired term of office until the next regularly scheduled convention.
- 5) Vice President: In the event that an office is vacated the Executive Council shall appoint a Vice President for the unexpired term of office.

#### b Recall of Officers

- 1) When at least two-thirds of the members of the State Council within a period of sixty (60) calendar days ask for a recall of an elected officer, they shall do so by submitting a request in writing to either the President or Secretary-Treasurer, or whichever of the two is not subject to recall. Any elected officer of the Federation may be recalled by a three-fourths vote at any regular or special meeting of the State Council, providing each member of the Council has been notified of the proposed recall vote at least one week prior to the meeting. The notification will include a complete statement of charges and a reply by the officer subject to recall. Any officer recalled may appeal the decision of the State Council to the member locals by referendum, upon filing a request for same either with the President or the Secretary-Treasurer or whichever of the two is not subject to recall. If the President and the Secretary-Treasurer are both subject to recall, the Senior Vice President of the Executive Council shall be the petitioned officer. In all such cases, the petitioned officer shall poll the locals. A majority of all votes cast shall be necessary for reinstatement of an officer.
- 2) When at least one-third of the member locals within a period of sixty (60) calendar days ask for a recall of an elected officer, they shall do so by submitting a request in writing to either the President or the Secretary-Treasurer, or whichever of the two is not subject to recall. The petitioned officer shall poll the locals within thirty (30) days from the receipt of the petition. It shall be the duty of the officers of the member locals to submit the question to be voted on, with the summary discussion to all of their respective local members, and to supply all members with official ballots. The ballot shall be secret. The officers of the member locals shall have the responsibility for the integrity of the ballot. The individual ballots cast shall be tabulated by the locals, and all ballots, together with tabulations, shall be delivered to the polling officer. Only ballots mailed or received by the polling officer within six weeks of the date sent out shall be counted. A two-thirds majority of all votes cast shall be necessary to recall.
- 3) Only ballots of locals in good standing on the closing date of the recall referendum shall be counted. The votes of said

locals shall not exceed in number the members for which per capita were last paid by the respective locals. Should the number of ballots cast by a local exceed the number to which the local is entitled, the ayes and noes shall be reduced proportionately to come within the required number of votes.

- 4) The polling officer shall tabulate the votes sent in by the locals and within one week of the closing date for receiving such ballots from the locals, shall announce by mail the results of the referendum. The tabulations by the polling officer shall be verified at the next meeting of the Executive Council.
- 5) The State Council shall have the power to adopt such further rules and regulations governing referenda, as it shall deem necessary.

## ARTICLE V: *State Council*

### Section 1. Purpose

It shall be the purpose of the State Council to conduct the business of the Federation and to conduct all the affairs of the Federation in the periods between conventions.

### Section 2. Duties and Responsibilities

- a. The State Council shall implement the policies set by the delegates of conventions.
- b. The State Council shall conduct the affairs of the Federation in the periods between conventions
- c. The State Council shall approve the annual budget of the Federation and may revise it as deemed necessary.
- d. The State Council shall provide policies and direction for the officers of the Federation.
- e. The State Council shall establish committees, as it deems necessary, not inconsistent with this Constitution and the By-Laws.
- f. The State Council shall have the power to interpret and enforce this Constitution and to make rules not in conflict with this Constitution and shall report such rules to the succeeding convention for approval or rejection. Any interpretation of the Constitution by the State Council may be appealed at any subsequent convention.
- g. The State Council shall establish the following Councils: Community College Council (CCC), Council of Classified Employees (CCE), Universities Council (UC), and Early Childhood Kindergarten through 12th Grade Council (EC/K-12).

### Section 3. Membership

The State Council shall comprise the President, the Secretary-Treasurer, the Vice Presidents, and the designated delegate or alternate of each member local and/or council of locals.

## Section 4. Meetings

- a. The State Council shall meet two times a year. The exact date, place, and other details shall be determined by the Executive Council. Special meetings of the State Council may be called by the President or by two-thirds of the members of the State Council, provided that a written notice stating the purpose of such meeting is sent by registered mail to all members of the State Council at least two weeks prior to the date set for the meeting.
- b. A quorum for transaction of business shall comprise twenty-five percent (25%) of the locals or of locals representing one-third (1/3) of the members of the CFT.

## Section 5. Special Operating Rules

- a. The voting strength of each local at each State Council meeting shall be specified by the Secretary-Treasurer according to the voting strength of the local as per the most recently tabulated per capita payment submitted by the local.
  - 1) The delegates from a local or council of locals shall have the number of votes to which the local or council is entitled under the terms of the By-Laws, Article I, Section 2, 7 and 8.
  - 2) Locals combined into a council shall be considered as one local in apportioning votes in accordance with the By-Laws, Article I, Section 2.
  - 3) Each elected officer of the Federation and other voting members of the Executive Council shall be entitled to one vote unless that person is representing a local.
  - 4) Any national AFT Vice President from a CFT local shall have one vote unless that person is representing a local.

## ARTICLE VI: *Executive Council*

### Section 1. Membership

The voting members of the Executive Council shall be the President, the Secretary-Treasurer, twenty-four Vice Presidents, and the Presidents of the Councils as listed in Article V, Section 2g.

- a. The Executive Council shall implement the policies of the Convention and the State Council.
- b. The Executive Council shall have the authority to conduct all the affairs of the CFT (including the authority to borrow money from commercial and private institutions) during the periods between meetings of the State Council and the Convention.
- c. The Executive Council shall prepare the annual budget subject to the approval of the State Council. The proposed budget shall be distributed to all local presidents 14 days prior to its approval by the State Council.
- d. It shall be the responsibility of the Executive Council to have the financial records of the CFT audited every even numbered year and to submit the audits to the State Council and to the AFT.

- e. The Executive Council shall have the authority to assign duties and define areas of responsibility for each Vice President and the Secretary-Treasurer as stated in Article IV, Section 2b, 2c and 2d. The Executive Council shall select one of its Vice President members as the Senior Vice President.
- f. The Executive Council shall receive, review and approve all requests for defense funds and report to the State Council regarding the expenditure of funds.
- g. The Executive Council shall hire employees, as it shall deem necessary. Administrative employees shall be employed by individual or union contract with provision for orderly dismissal with the right of hearing and counsel available to the employee. Other employees may be employed by union contract and procedures shall be established in all contracts for orderly dismissal with the right of hearing and counsel unless otherwise provided in a union contract. The provisions of this sub-section shall not apply to the elected officers of the CFT.

## ARTICLE VII: *Procedures for Amending*

### Section 1. Amendment by Convention

- a. This Constitution may be amended at a duly called convention by a two-thirds vote of delegates present and voting. All proposed amendments must be submitted in writing at least eight weeks prior to the Convention by the State Council, the Executive Council, the Councils as listed in Article V, Section 2g, or any affiliated local. The Secretary-Treasurer of the CFT must transmit copies of the proposed amendment(s) to the presidents of all affiliated locals at least 30 calendar days prior to the Convention.
- b. Each proposed amendment to this Constitution shall be published for the delegates as it was received by the Secretary-Treasurer.

### Section 2. Amendment by Referendum

This Constitution may be amended by a referendum of the membership. Only members of locals in good standing shall be permitted to vote on the amendment. A majority of eligible votes is required for adoption. Submitting the amendment for referendum requires the following steps:

- a. The proposed amendment shall be submitted in writing by petition of not fewer than 200 members from not fewer than ten locals, by at least 10 percent of the locals, or by locals representing at least one-third of the total membership.
- b. The Secretary-Treasurer shall, within 30 days of the receipt of the proposed amendment, transmit copies of the official ballots to all local presidents with a summary of the divergent arguments. Upon receipt of the votes, the Secretary-Treasurer shall announce the results by mail within one week of the close of the date of the referendum. The officers of the various locals shall be responsible for the integrity of the ballots. Voting shall be by secret election. Should the number of ballots cast within any

- local exceed the number of members for which a local pays a per capita tax, the ayes and noes shall be reduced proportionately. All locals shall be notified regardless of standing.

- c. The balloting must take place within sixty (60) days following the date on which the Secretary-Treasurer sends the amendment to the locals.
- d. 1) The Secretary-Treasurer shall hand over the unopened ballots for counting to a three-member ballot committee appointed by the President and confirmed by the Executive Council.
- 2) The committee, upon completion of the count, shall report to the Secretary-Treasurer, the President and the Executive Council the results of the balloting. The Secretary-Treasurer shall notify in writing the presidents of all locals within one week of the results of the election.
- e. No referendum vote shall be held within eight weeks prior to the convention.

### Section 3. Amendment by Vote of Locals

This Constitution may be amended by a two-thirds vote cast by locals in good standing. The proposed amendment must be submitted by the State Council. The Secretary-Treasurer shall transmit the ballots to the locals within 30 days from the date of the approval of the State Council as follows:

- a. Each local shall be entitled to the same number of votes to which it is entitled under the terms of the By-Laws, Article I, Section 7. A majority of eligible votes must be cast by the locals in order for there to be a valid election.
- b. The vote must be cast within sixty (60) days from the date on which the Secretary-Treasurer transmits the amendment to the locals and the Constitution may not be amended by vote of locals within eight weeks prior to the Convention.
- c. The vote may be taken by any policy-making body for each local; however, the president and secretary of each local shall attest to the manner of voting and shall submit the election results to the Secretary-Treasurer.
- d. The Secretary-Treasurer shall transmit copies of the official ballot indicating the number of votes to which the local is entitled, with a summary of the divergent arguments, to the presidents of all locals in good standing.
- e. Every local shall be notified of the results of the vote and shall be given the arguments relating to the matter.
- f. Such amendments shall take effect once the Executive Council certifies that the correct procedures have been followed.

# By-Laws

## ARTICLE I: Conventions

### Section 1. Annual Meetings

A state convention shall be held each calendar year at a time and place to be designated by the Executive Council. A convention call must be issued to all locals at least sixty (60) days prior to the date of the convention, specifying the program of the convention, the time of preliminary committee meetings, and the time the delegates are expected to arrive. In case the President fails to call said meeting within the time specified, the State Council shall have the power to call the Convention.

### Section 2. Councils of Locals

a. Locals with fewer than 100 members each, but in the aggregate fewer than 300 members, from a contiguous geographic area, may form councils of locals for the general purpose of electing a common delegate to the Convention and/or State Council. Locals which form such a council under this section:

- 1. shall adopt a common resolution to establish the council in a regular meeting of such local no later than two months prior to the convention;
- 2. shall nominate at the same meeting of each local a member or members for the council's delegate(s);
- 3. shall elect at a meeting of each such local or by mail ballot, agreed to by the council and in conformity with federal law. The delegates and alternates shall be elected no later than two months prior to the Convention by a common secret ballot listing all nominees and their local numbers. The nominees receiving the highest number of votes totaled among all locals in the council will be the delegates and the next highest, the alternates. The number of delegates and alternates to Convention will be determined by Section 8 and be based on the aggregate membership of the council;
- 4. shall forward properly signed credentials from each local in the council for the duly elected delegate(s) and alternate(s), in time to reach the CFT office no later than two weeks prior to the Convention. The Executive Council shall approve procedures consistent with the requirements of this section for the election of the council delegates. The Secretary-Treasurer shall forward such procedures to all locals reporting fewer than 100 members in per capita five months prior to the Convention. No local participating in the council shall have any other delegate seated in the Convention. The voting strength of the council's delegate(s) shall be based on the aggregate of the membership in the locals which credential the council's delegate(s).
- b. The Executive Council is authorized to recognize a council of locals organized for the convenience of doing business with one

employer common to all of the council's locals for the purpose of electing delegates to the Convention. Nomination procedures shall be established by such council to permit all such locals to nominate from their respective memberships at least thirty days in advance of the election, which shall be conducted by mail ballot in conformance with federal law. No other delegates shall be seated in the Convention from any individual local of the council unless the local has notified the CFT office one month prior to the Convention that it is not participating in such council for the purposes of electing delegates to the Convention. The voting strength of such council shall be based upon the aggregate membership of all such locals, which individually credential all delegates common to the council

### **Section 3. Members at Large**

- a. Members-at-large may nominate and elect delegates to convention by mail ballot in conformity with federal law. The delegates and alternates shall be elected no later than two months prior to the Convention by a secret mail ballot listing all nominees and their school districts. The nominees receiving the highest number of votes totaled will be considered delegates and the next highest, the alternates. The number of delegates and alternates to convention will be determined by Section 8 and be based on the aggregate membership of the members-at-large
- b. A member-at-large delegate or alternate to Convention must be in good standing with the CFT

### **Section 4. Ex-Officio Delegates**

Voting members of the Executive Council who are not delegates from their locals shall be ex-officio delegates at the convention and shall each have one vote

### **Section 5. Credentials**

- a. The Secretary-Treasurer shall send a notice to locals in arrears one month before the Convention
- b. The President shall cause suitable credential forms to be prepared and sent to each local. The President shall appoint a Credentials Committee of five; one member must be the Secretary-Treasurer.
- c. Locals must have delegates and alternates registered with the Secretary-Treasurer two weeks in advance of the Convention. Any exceptions shall be referred to the Credentials Committee. To be seated, delegates must be from locals in good standing and present credentials signed by the proper authorities of the local no later than noon of the second day of the Convention.

### **Section 6. Delegates**

A credentialed delegate must be a member from a local in good standing. The delegate must be elected by secret ballot and in accordance with federal law. At the time of credentialing delegates, a local may certify alternates to serve in the place of its delegates

who may be absent from the Convention. Alternates must meet the same membership requirements as delegates

### **Section 7. Delegate Allocation**

- a. One delegate to the annual convention may be elected by each local or council of locals as stated in Section 2 having a membership of twenty-five or fewer. For each additional twenty-five members, or fraction thereof, one additional delegate may be elected. The delegate strength to any state convention shall be based on average membership pursuant to Section 8 of this article.
- b. Each organization of retired members chartered by AFT may elect one delegate to the AFT and CFT Conventions in the manner prescribed by Section 6 of this Article and shall be entitled to one vote at the Convention.

Such delegates shall be entitled to all rights and privileges of a delegate except that such delegates shall not be entitled to nominate any candidate for Federation office or cast a vote in the election of Federation officers unless such delegates have been elected to that position by secret ballot vote.

### **Section 8. Determination of Average Membership**

Membership shall mean the average number on which the per capita tax has been paid for the first twelve months of the fourteen-month period immediately preceding the month in which the Convention meets, provided:

- a. that no local in arrears for two months at the time of Convention shall be entitled to representation;
- b. that, in the case of locals which have been chartered during the one year preceding the Convention, the average shall be computed on the basis of the number of months of affiliation, the minimum for such computation to be two months.

### **Section 9. Roll Call Voting Strength**

On all roll call votes in the annual convention, each local represented shall be entitled to a number of votes equal to the average membership as defined in Section 8 of this Article.

### **Section 10. Distribution of Votes**

The votes of a local shall be distributed as evenly as possible among the delegates present at the time of the voting, but votes shall not be fractioned. All additional votes shall be assigned by lot or by an objective formula which has been previously reported to the Secretary-Treasurer, with no delegate getting more than one of the additional votes. In the election of CFT officers and of delegates to organizations with which the CFT is affiliated, all voting shall be by roll call vote except when the election is by unanimous consent, and each local represented shall be entitled to the average membership as defined in Section 8 of this Article.

## **Section 11. Roll Call Vote (Resolutions and Constitutional Amendments)**

A motion calling for a roll call vote shall require a 25% vote for adoption. No debate, amendment, or other motion affecting the question on which the roll call vote was ordered may be made after a roll call has been ordered. The presiding officer of the Credentials Committee shall call the roll of locals entitled to vote. The Secretary shall record each vote as cast and may appoint other tellers to assist in recording and tabulating the votes. Every local shall be entitled to a number of votes equal to the average membership as defined in Section 8 of this Article. Any local, in order to cast its votes, must have a delegate or alternate present on the Convention floor. The ranking delegate shall report the vote of the local to the presiding officer of the Credentials Committee when called upon. After a roll call has been taken, the presiding officer shall call for the next item on the agenda, action on the pending motion being automatically postponed pending the tabulation of the vote. The results of the roll call vote shall be tabulated by the committee on credentials and reported to the Convention immediately upon completion of the tabulation according to the following procedure:

- a. The total vote shall be read;
- b. If any delegate challenges the vote of his/her local, the roll of delegates from that local shall be read, and each delegate shall rise as his/her name is called, announce his/her vote and state the number of votes he/she is casting;
- c. The report on the roll call vote shall then be revised to agree with the oral vote just taken;
- d. If any ten delegates request it, the vote by locals shall be posted;
- e. No adjournment shall take place until the results of the roll call vote have been announced.

## **Section 12. Nominations and Election Procedures**

- a. Nominations: Nominations of CFT officers and delegates to the American Federation of Teachers convention and to the California Labor Federation convention shall be by an "announcement of candidacy form" signed by the candidate for office and presented to the Secretary-Treasurer not later than the time and date specified in the Convention rules for nominations and elections. The names of all announced candidates shall be read to the Convention. Nominations may be made from the floor. All floor nominees must immediately complete the "announcement of candidacy form." Nominations shall be declared closed by the presiding officer after asking for nominations from the floor three times for each office. An opportunity shall be given for any person nominated to decline.
- b. Speeches: Each candidate for president may have ten minutes for his/her campaign speech. Each candidate for Secretary-Treasurer may have five minutes for his/her campaign speech. Each candidate for Vice President or other office may have two minutes for a campaign speech. For the purpose of speeches each candidate shall be recognized in alphabetical order. Each

candidate may designate an alternate speaker. Except when the election is by unanimous consent, the election shall be by roll call vote in accordance with the following procedures:

- 1) Balloting for the election of officers and delegates shall take place under supervision of the Elections Committee. No other official business shall be conducted during balloting. Only delegates who are officially seated may vote in the election.
- 2) The ballots shall be distributed to the ranking delegate of each delegation under the direction of the chair of the Elections Committee. (These ballots shall be prepared under the supervision of the Elections Committee). The ranking delegate shall equally distribute the votes among delegates representing themselves. No delegate shall have more than one vote more than each of the other delegates.
- 3) Each delegate voting shall enter on the ballot the number of the local, the delegate's printed full name, the number of votes to be cast, the actual vote, and shall sign the ballot.
- 4) Ballots shall be deposited in the ballot boxes not later than one hour following the opening of the polls. Ballots may be deposited by the ranking delegate or delegates may elect to deposit their own ballots.
- 5) After the polls have closed, the Elections Committee shall supervise the counting of the ballots. The tally sheet shall be certified as accurate and retained by an independent body designated by the Elections Committee. The chair of the Elections Committee shall report the results of the election to the Convention.
- 6) The independent body shall retain all ballots for two years. At the end of two years the Elections Committee shall destroy the ballots. A local may submit a resolution from the Executive Board to the President requesting a copy of all ballots cast by delegates of the local.

## **Section 13. Alternates**

When a delegate leaves the Convention, his/her place in the Convention may be taken by an alternate, if any has been certified by the Credentials Committee as duly elected by the local and in the order as elected. No other transfer or substitution of voting rights is allowed.

## **Section 14. Quorum**

Delegates representing a majority of all votes eligible to an annual convention shall constitute a quorum.

## **Section 15. Convention Resolutions**

- a. Resolutions for the Convention may be introduced by locals, by the State Council, by the Executive Council, by CFT standing committees, by councils, or by convention committees. No resolution may be introduced later than six weeks prior to the opening of the Convention except by two-thirds vote of the Conven-



tion. Any resolution submitted by a local shall bear the signature of two elected officers of the local, certifying that the resolution was approved for submission to the Convention by the Executive Board or the membership of the local.

- b. Any resolution passed by the convention requesting a donation of money by CFT to other organizations or causes shall only serve as a recommendation to the Executive Council. The Executive Council will review the available funds and determine the exact amount to be donated.

## Section 16. Convention Committees

- a. Convention committee chairs and the members of the Constitution Committee shall be appointed by the President with the approval of the Executive Council. In appointing members of other convention committees the President shall give consideration to the expressed choices of delegates as indicated on their committee choice cards which are included with the Convention call. However, the President shall not be bound by the choice cards, but shall give equal weight and consideration to service on standing committees and to the proper balancing of committees. Members of CFT standing committees who are delegates shall be appointed to the corresponding convention committees in order to coordinate the work of the Convention committees and the CFT standing committees. Changes in assignments of delegates to committees shall be made only by the President or upon application. Such application shall include a written statement of the reason for desiring the change. No change shall be made after noon on the first full day of the Convention.
- b. A delegate interested in a specific problem or resolution shall have the opportunity to present his/her viewpoint to the appropriate committee at a time designated by the committee chairperson.
- c. Reports of convention committees shall be received at the time designated in the printed program or as designated by the Convention. Reports shall be made in the order assigned by the chairperson of the Convention Committee and the President.
- d. Debate in committees may be limited by a two-thirds vote of the committee.

## ARTICLE II: Finance

### Section 1. Per Capitas

- a. Effective September 1, 2011, the per capita rates for active members and non-member fee payers of the CFT will be:
- 1) Regular rate members and regular rate agency fee non-members earning \$26,000 or more: \$448.08 (12 monthly payments of \$37.34).
  - 2) Temporary employee members or temporary agency fee non-members or short-term employee members or short-term agency fee non-members earning \$2,600 or more per month: \$44.81 per month employed, to a yearly maximum of \$448.08.
- 3) Non-bargaining agent members and members-at-large: AFT/CLF per capita tax plus 40% of CFT full-time per capita tax.
- 4) Any Special Assessments described in Article II, Section 5 are added to the per capita rates described in Section 1.
- b. Classes of Membership
- 1) Locals may establish a class of members which shall consist of members who receive less than the lowest range and salary step of full-time teachers paid by their employer or whose salary is less than \$26,000, whichever salary is higher. Such locals may pay per capita tax for those individuals at one-half (1/2) the regular rate. Locals with temporary employee members or temporary agency fee non-members or short-term members or short-term agency fee non-members may establish a class of members who receive less than one-tenth of the lowest range and salary step of full-time teachers paid by their employer or salary is \$2,600 per month whichever is higher. Such locals may pay per capita tax for those individuals at one-half (1/2) of the rate in a(2), to a yearly maximum of \$224.04.
  - 2) Each local shall pay on behalf of members and agency fee non-members who receive less than \$14,000 per year (or \$1,400 per month for temporary or short-term employees) at one-fourth (1/4) the rate in a(2), to a yearly maximum of \$112.02. Effective September 1, 2011, this income threshold shall be increased on a yearly basis by a percentage equal to the public sector Employment Cost Index published by the U.S. Department of Labor.
  - 3) Each local shall pay on behalf of members and non-member fee payers who receive less than \$8,500 per year (or \$850 per month for temporary or short-term employees) at one-eighth (1/8) the rate in a(2) to a yearly maximum of \$56.01. Effective September 1, 2011, this income threshold shall be increased on a yearly basis by a percentage equal to the public sector Employment Cost Index published by the U.S. Department of Labor.
  - 4) Non-bargaining agent member and members-at-large dues shall be 40% of CFT per capita rates as described in Article II, Section 1a and shall increase by the same amount as the AFT and California Labor Federation per capita rates. The Executive Council shall determine dues for those members-at-large who pay agency fee to another organization. Provisions in Article II, Section 1b, 1), 2), and 3) of the By-Laws shall apply to non-bargaining agent members and members-at-large.
  - 5) Laid-off employees or employees on unpaid leave. Such locals may pay per capita tax for such members at the rate of \$1 per month.

- 6) Newly organized locals, and units within locals, shall pay \$5 per member per month employed from the representation certification date until their first contract is ratified.
- c. Back per capitas will be paid at the per capita rate in effect when the debt is incurred.
- d. Fifty cents (\$.50) or proportional share of each unit member's monthly per capita and fifty cents (\$.50) or proportional share paid monthly for any persons in the bargaining unit on whose behalf agency fees are paid on a twelve month basis shall be placed in the CFT Legal Defense Fund. The CFT Legal Defense Fund shall be maintained as a revolving fund under the direction of the CFT Executive Council.
- e. Two dollars and fifty cents (\$2.50) or proportional share of each member's monthly per capita on a twelve-month basis shall be placed in the CFT COPE fund. The political fund shall be maintained as a revolving fund under the direction of the CFT COPE Executive Council. This fund shall be used for contributions to candidates for state or local office and/or for ballot propositions. Salaries and benefit costs for the employees of the CFT Political Department and other expenses related to political activities may also be paid from the CFT COPE fund. In order to increase CFT COPE funding, the state Convention may increase per capita by a flat amount in excess of the percentage amount required to be voted on as a result of the calculation in Section 2.
- f. Twenty cents (\$.20) or proportional share of each unit member's monthly per capita on a twelve-month basis shall be placed in the CFT Raoul Teillet Scholarship Fund.
- g. Ten cents (\$.10) or proportional share of each unit member's monthly per capita and ten cents (\$.10) or proportional share paid monthly for any persons in the bargaining unit on whose behalf agency fees are paid shall be placed in the CFT Militancy Fund. The CFT Militancy Fund shall be maintained as a revolving fund under the direction of the CFT Executive Council. The Militancy Fund shall be used to help and defend persons who have been targeted or retaliation by employers as a result of their CFT union activities and other similar purposes as determined by Executive Council.
- h. Fifteen cents (\$.15) or proportional share of each unit member's monthly per capita and fifteen cents (\$.15) or proportional share paid monthly for any persons in the bargaining unit on whose behalf agency fees are paid shall be placed in the CFT Educational Issues Fund. The Educational Issues Fund shall be maintained as a revolving fund under the direction of the CFT Executive Council. As determined by the Executive Council, the Educational Issues Fund shall be used to develop and publicize CFT positions of educational issues.

## Section 2. Per Capita Calculations

The per capitas for active members of the California Federation of Teachers will be adjusted each year with the approval of the state convention by a percentage amount not to exceed the statewide

percentage change in average salaries of all bargaining units. The annual percentage change in the per capitas will be calculated as follows

- 1) First, the lowest salary step for full-time beginning employees will be added to the highest salary step for full-time employees, the highest step being one without a doctorate and without anniversary increments.
- 2) Second, the sum of these two salaries will then be divided by two, providing the average salary. These averages will be calculated for all districts having exclusive representatives affiliated with CFT. The salary schedules used will be those effective on December 1 of the current year.
- 3) The percentage change in average salary from December 1 of a current school year to December 1 of the next year will be calculated and applied to the regular rates above.
- 4) The Executive Council of the CFT will certify each year that the appropriate procedures have been used to calculate the CFT per capitas to be effective September 1 of that calendar year and make a recommendation to the state Convention.

## Section 3. Per Capita Reports

### a. Due Dates and Exceptions

- 1) Locals shall fill out and forward to the Secretary-Treasurer, on or before the 15th day of each month, a report for all members in good standing and agency fee payers in the local on the last day of the prior month, together with all per capita taxes due to the California Federation of Teachers. This monthly report shall be made on the forms furnished for that purpose.
- 2) Exceptions to the due date may be granted to a local or council of locals by a majority vote of the CFT Executive Council after receipt of a written request that justifies such an exception.

### b. Alternate Method for Locals Representing Day-to-Day Employees

- 1) Locals or councils of locals may fill out on or before the 15th of January, and on or before the 15th of July, an estimate for the total number of days to be worked by day-to-day employees (such as substitute teachers) in the succeeding six-month period, and the aggregate number of full-time equivalent positions that represents in the appropriate dues category based on yearly pay for a day-to-day employee working 180 days a year. The local shall pay per capita taxes based on the estimated number of days to be worked during the time period divided by 180 in the dues category based on the expected annual pay of a day-to-day employee working 180 days in a year. The local shall subtract from such payment any assessments automatically remitted to CFT through AFT in the estimate period.
- 2) At the date of the succeeding estimate period, the local or council of locals shall submit a report of the actual number

of days worked by day-to-day employees in the preceding period and either submit an additional amount of per capita tax to CFT based on underestimation, or subtract the over-estimated amount from the following six-month estimated per capita tax.

#### **Section 4. Student Members**

Where a local affiliated with the AFT and the CFT exists in or near a public or private high school, college, university, or other post-secondary educational institution in California, that local may accept prospective educators as AFT and CFT student members. No CFT per capita tax shall be collected for student members. Annual dues of \$5 per year shall be paid directly to the national AFT office by the local for each student member. Student members shall only have visitor privileges at CFT conventions. A prospective educator may also be accepted as a CFT member-at-large.

#### **Section 5. Per Capita Delinquency**

- a. Unless a different due date has been approved by the Executive Council, a local's monthly per capita tax is due on or before the 15th day following that month except as specified in Sections 3 a. and 3.b. above. When a local is two months in arrears, its president and treasurer shall be notified by the CFT Secretary-Treasurer. For example, January per capitass not received by April 15th will be considered two months in arrears.
- b. When a local is three months in arrears, it shall be considered in bad standing and lose voting privileges. A local in bad standing shall be ineligible to participate in the CFT Legal Defense grant and COPE programs. The members of a local in bad standing will lose eligibility for participation in the CFT scholarship program. When a local is three months in arrears, its Executive Council shall be notified by the CFT Secretary-Treasurer by certified mail. For example, January per capitass not received by May 15th will be considered three months in arrears.
- c. A local that is more than three months in arrears shall pay interest on all monies owed in excess of three months' per capita. The rate of interest shall be at the rate then paid or payable for borrowed funds by the CFT, unless the Executive Council by a two-thirds vote shall decide to waive the interest provision where there is substantial justification.
- d. When a local is four months in arrears, it shall be suspended and may be reinstated by a vote of the Executive Council upon payment of back per capitass and interest. A local that the Executive Council refuses to reinstate shall have the right to appeal to the next State Council or Convention. When a local is four months in arrears, its members shall be notified by the CFT Secretary-Treasurer. For example, January per capitass not received by June 15th will be considered four months in arrears.

#### **Section 6. Special Assessments**

Special Assessments may be levied by two-thirds vote at the state Convention or by the Executive Council. All provisions of Article II,

Section 4 shall apply to special assessments.

- a. Effective July 1, 2010, and ending June 30, 2013, one dollar (\$1.00) or proportional share of each unit member's monthly per capita on a twelve-month basis shall be separately assessed and directly placed into the CFT general fund.
- b. Effective September 1, 2010, two dollars (\$2 00) or proportional share of each unit member's monthly per capita on a twelve-month basis shall be separately assessed and directly placed into the CFT COPE fund. Proceeds from this assessment shall be designated as the "Fund for California's Future" and shall be maintained as a revolving fund under the direction of the CFT COPE Executive Council. This assessment will continue until rescinded by a two-thirds vote at the Convention or by the Executive Council.

#### **Section 7. Staff Funding Program**

- a. The purpose of the CFT Staff Funding Program is to reimburse those locals that have paid for professional staff in order to minimize the use of CFT field representatives for negotiations, grievances, or other locally specific services. All other general CFT services such as training, publications, member database management, research, communications assistance, legal defense grants, governmental relations, etc. are available to all CFT locals.
- b. Upon application to the CFT, on or before September 1 preceding the CFT budget year for which the staff funding program is to commence, any local or council of locals that directly employs and compensates or pays out of local funds for reassigned time for one or more professional staff persons shall receive, after payment of monthly per capitass, a payment for staff funding assistance from the CFT equal to the following formula:
  - 1) Unit size 1000 or fewer: Locals and councils of locals with a total unit or units of 1000 or fewer shall receive a staff funding program from the CFT equal to seventy percent (70%) of the first \$18.34 of the per capitass paid to the CFT by the local or council of locals on a monthly basis
  - 2) Unit size above 1000: Locals and councils of locals with a total unit or units of above 1000 shall receive a staff funding program from the CFT equal to sixty percent (60%) of the first \$18.34 of the per capitass paid to the CFT by the local or council of locals on a monthly basis.
  - 3) All locals and councils of locals that have non-certificated employees in their unit or are a unit of classified employees and that qualify for the CFT Staff Funding Program, shall receive staff funding from the CFT equal to seventy percent (70%) of the first \$18.34 of the per capitass paid for non-certificated employees of the unit.
- c. Effective upon adoption of this provision, the base on the Staff Funding Program shall be automatically adjusted on September 1 of each year by the percentage increase in per capitass as set forth in Section 2 of this article unless the base is adjusted by a

different amount by a vote of the convention. Convention action to limit the base of the staff funding program cannot be taken in successive years.

d. Locals and councils of locals that employ part-time professional staff persons shall receive corresponding percentages of the staff funding formula specified in Article II, Section 6b 1), 2), and 3) of the By-Laws on a monthly basis. The staff funding formula per capita base specified in this section shall not include the CFT Legal Defense Fund or the COPE contributions (Article II, Section 1, d and e, By-Laws)

e. Locals and councils of locals staff working on employer paid release time shall not be covered by the provisions of Article II, Section 6b, 1), 2), and 3) of the By-Laws

f. Conditions of Employment of Formula-funded Staff

1) Professional staff who are directly employed or for whom reassigned time is purchased by the local would generally be expected to perform some of the following services provided by a CFT Field Representative with some assistance from the field representative as needed including but not limited to:

- a. Designing and running internal membership drives and agency fee campaigns.
- b. Designing basic flyers and writing basic campaign literature.
- c. Designing and conducting contract surveys.
- d. Writing contract language.
- e. Negotiating collective bargaining contracts using traditional and non-traditional formats and models.
- f. Analyzing budgets (with some assistance from the CFT Research Department).
- g. Filing grievances and unfair labor practice charges, representing members at hearings, with assistance from legal counsel, as necessary.
- h. Assisting in get-out-the vote and related political activities
- i. Assisting locals in compliance with national and state affiliate constitutional obligations.
- j. Troubleshooting, brainstorming and assisting the local in day-to-day activities
- k. Advising the local on grievances, arbitrations, negotiations, budgets and concerted activities.
- l. Conducting training sessions for the local members.

2) The salary rate of any professional staff person provided for in this section shall not be less than the minimum compensation of the full-time employees he/she represents. The salary rate of any professional staff person representing only part-time employees shall not be less than the minimum compensation of the employees he/she represents. The professional staff person shall receive step increases comparable to and on the same timeline as those employees the staff person represents. Locals shall also provide salary

column and step advancement to professional staff persons for job-related experience and training.

3) The contributions of the local toward employee benefits and other conditions of employment for directly employed professional staff persons shall be at least comparable to those of the full-time employees he/she represents. The contributions of the local toward employee benefits and other conditions of employment for any directly employed professional staff person representing only part-time employees shall be at least comparable to the employees he/she represents. When any professional staff person is hired on a less than full-time basis, he/she will receive the pro-rata salary and benefits of the corresponding full-time position.

4) The conditions of employment of the professional staff person shall be put to writing in the form of a mutually agreeable contract. The CFT and CFT locals shall seek to provide formula-funded professional staff a group benefits program that includes medical, dental, vision, long-term disability, and retirement benefits.

g. The Executive Council may recognize a council of locals consisting of locals from a contiguous geographical area, organized for the convenience of participating in the staff funding program. The establishment of these councils shall not affect the autonomy of each local, and each local may send its own delegates to convention and state councils. Locals that receive staff funding assistance should participate in CFT meetings and events to the extent they are financially able. These events include the CFT Convention, the CFT Leadership Conference and State Council and jurisdiction-appropriate Division Council meetings.

h. As a condition of funding,

- 1) a local shall implement the pass-through of AFT and CFT per capita increases or have a dues system based on a percentage of salary and notify the CFT of such implementation or system as part of the annual application process,
- 2) formula funded staff shall participate in training programs and work up to five (5) days, at the request of the CFT, to assist the CFT, other locals or organizing committees.

i. The Executive Council shall establish rules and regulations for the implementation of this section.

**Section 8. Travel Reimbursement for State Council**

a. The CFT shall fund the expenses of one delegate per local at the CFT State Council meetings as provided for in the annual budget. The purpose of establishing this fund is to encourage the participation of more locals in the State Council, especially the participation of smaller locals.

b. The CFT Executive Council shall establish rules and regulations for implementing this section.

c. Upon application, eligible locals who are in good standing and

eligible to vote at the State Council will receive reimbursement of appropriate expenses according to the following guidelines:

Size of Local	Percent Reimbursement
1000 or more	50 percent
600-999	70 percent
300-599	80 percent
100-299	90 percent
Below 100	100 percent

d Upon request, bargaining agent locals without agency fee shall be reimbursed at the next higher level of reimbursement.

### **ARTICLE III: *Rules***

The rules contained in Robert's Rules of Order, newly revised, shall govern this Federation in all cases to which they are applicable and in which they are not inconsistent with rules regularly adopted by the Federation.

### **ARTICLE IV: *Procedures for Amending***

The procedures for amending the By-Laws shall be the same as the procedures for amending the Constitution except that only a majority vote is needed to amend.

Form **8868**

(Rev. January 2012)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **►**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only ☐ **►**

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	CALIFORNIA FEDERATION OF TEACHERS AFT 8004	<input checked="" type="checkbox"/> 94-1271864
	Number, street, and room or suite no. If a P O box, see instructions.	Social security number (SSN)
	4123 LANKERSHIM BLVD.	<input type="checkbox"/>
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	NORTH HOLLYWOOD, CA 91602	

Enter the Return code for the return that this application is for (file a separate application for each return) ☐ 0 ☐ 1

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► ELIZABETH SOTO

Telephone No. ► (818) 843-8226

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐ **►**
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)           . If this is for the whole group, check this box ☐ **►**. If it is for part of the group, check this box ☐ **►** and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 20 12, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 20 11 or

► ☐ tax year beginning           , 20       , and ending           , 20       

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
- ☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	NONE
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	NONE
c	<b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	NONE

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Cat. No 27916D

Form **8868** (Rev. 1-2012)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print  File by the due date for filing your return See instructions	Enter filer's identifying number, see instructions	
	Name of exempt organization or other filer, see instructions. CALIFORNIA FEDERATION OF TEACHERS AFT 8004	Employer identification number (EIN) or <input checked="" type="checkbox"/> 94-1271864
	Number, street, and room or suite no. If a P O box, see instructions 4123 LANKERSHIM BLVD.	Social security number (SSN) <input type="checkbox"/>
	City, town or post office, state, and ZIP code For a foreign address, see instructions NORTH HOLLYWOOD, CA 91602	

Enter the Return code for the return that this application is for (file a separate application for each return)

0 1

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of **ELIZABETH SOTO**  
Telephone No. **(818) 843-8226** FAX No. \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 4 I request an additional 3-month extension of time until **NOVEMBER 15**, 20 **12**.
- 5 For calendar year **2011**, or other tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period
- 7 State in detail why you need the extension **ADDITIONAL TIME IS REQUESTED TO OBTAIN RECORDS NECESSARY FOR THE COMPLETION OF AN ACCURATE RETURN**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	8a	\$	NONE
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	NONE
c <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	NONE

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature  Title **ACCOUNTANT**Date **8/6/12**