

2014 DISTRICT & COUNCIL PTA ADVOCACY LEADERSHIP GUIDE



CALIFORNIA STATE PTA



The mission of California State PTA is to positively impact the lives of all children and families.

CALIFORNIA STATE PTA CORE VALUES

- The California State PTA is a professional, non-profit volunteer organization committed to the well-being of all children.
- We believe every adult has a responsibility to ensure that all children develop to their full potential.
- We believe parents are children's first teachers and that parent involvement is essential throughout a child's educational experience.
- We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways.
- We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.

PURPOSE OF THE CALIFORNIA STATE PTA

- To promote the welfare of children and youth in home, school, community and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

BASIC POLICIES

Basic policies govern the activities of all PTAs. These policies ensure a unity of purpose through the members' commitment to the mission, core values, purpose and goals of PTA. In addition, National PTA and the California State PTA are tax exempt under Internal Revenue Code Section 501(c)(3). As such, they must maintain strict adherence to its requirements in order to retain that exemption. These basic policies must be a part of every PTA's bylaws.

"The organization shall be noncommercial, nonsectarian and nonpartisan."

Refer to the appendix at the end of this guide to read the Basic Policies in full.



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SECTION 1

INTRODUCTION TO THE PTA ADVOCACY LEADERSHIP GUIDE



Thank you for taking on a very important leadership role in PTA. Your work makes a difference in the lives of children in your communities and throughout California.

PTA has many resources to assist you with advocacy, leadership and communication skills. We encourage you to visit the California State PTA website, www.captapta.org. Also, check the resources in the *California State PTA Toolkit*.

PTA districts, councils and units come in all sizes, shapes and experience levels. Some PTAs may be new to advocacy and others have a long history with active and seasoned advocates.

For PTA leaders new to legislative advocacy: We hope this guide will be useful to help you take the first steps to building and leading an effective advocacy program. Use this information to work on what you believe you can reasonably accomplish within your PTA.

For more experienced advocacy leaders: You may use this guide to build on an existing advocacy program.

The California State PTA legislation team appreciates all you do to help us better represent our children and families as their advocates.

An extensive list of useful advocacy resources is in Section 7 of this guide.

SECTION 2

PTA ADVOCATES FOR CHILDREN AND YOUTH



*"The necessity for securing adequate legislation
was apparent from the start."*

Mothers meeting in schoolrooms found that much might be done to make the school plant more healthful and attractive. While studying how best to raise their children, they noticed that many of the other children had serious unmet needs. They saw sickly children, insufficiently clad children, hungry children. And something had to be done about it. Thus began PTA advocacy.

— Excerpted from *History of the California Congress of Parents and Teachers, Inc., 1900-1944*, M.H. Strong, Editor

For more than 100 years, PTA has worked toward improving the lives of all children and youth in education, health and safety. Founded in 1897 as the National Congress of Mothers by Alice McLellan Birney and Phoebe Apperson Hearst, in the midst of the Industrial Revolution and a wave of immigration, our founders recognized the need to protect children from harsh working and living conditions.

As the largest volunteer child advocacy organization in the nation, National PTA is the conscience of the country for children and youth issues. Over the decades, PTA has emerged as a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education.

Today's PTA is a vast network of millions of families, students, teachers, administrators, and business and community leaders devoted to the welfare and educational success of children and the promotion of family engagement in schools.

We proudly live our motto, "***every child. one voice.***"



What is PTA Advocacy?

Advocacy means supporting and speaking up for children – in schools, in communities, and before government bodies and other organizations that make decisions affecting children.

If you have ever spoken with your child's teacher or principal regarding an issue you were concerned about, you are an advocate. PTA advocates speak not just for their child, but for all children in the class, in the school and in our communities.



There are many ways to be an advocate. Your role as an advocacy leader will be to help parents understand issues and develop skills to help them become effective advocates. It will be through the strength of working together as members of PTA that they will accomplish their goals and positively impact the lives of children and families in your communities.

Ways to advocate are described in the "Advocacy in Action!" portion of this leadership guide in Section 6.

PTA Successes

PTA was founded as an advocacy association and has a long legacy of successfully influencing state and federal policies as well as legislation to improve the lives of children and families.

Through advocacy, as well as family and community education, PTA helped secure laws and programs in the areas of:

- **Child Labor Laws**
- **Public Health Service**
- **Hot and Healthy Lunch Programs**
- **Juvenile Justice System**
- **Creation of Kindergarten Classes**
- **Mandatory Immunization**
- **Arts in Education**
- **School Safety**
- **School Funding**
- **Parent Engagement: Local Control and Accountability Plans**



Advocacy Matters Now

Although things look a lot different than they did in 1897 when PTA was founded, one thing hasn't changed – **our children still need a voice!**

Many of the issues that concerned PTA founders still exist for children in many communities such as poor nutrition and health, economic challenges and limited educational opportunities. There are many new and different challenges today: cyber bullying, texting while driving, greater academic pressures and expectations in a fast-paced and rapidly changing world.

As PTA co-founder Alice Birney might say today, "*Something still has to be done about it.*" Thus the important work of PTA advocacy goes on.

CALIFORNIA STATE PTA LEGISLATIVE PROGRAM

The role of speaking up and influencing legislation at the state level is the role of California State PTA. PTA membership, through the association's bylaws and actions of delegates at California State PTA conventions, directs PTA actions on legislation. The California State PTA Board of Managers is responsible for action on state legislation and qualified state ballot measures. California State PTA also works with National PTA in implementing the PTA advocacy program at the federal level.

District, council and unit PTAs are responsible for taking action on local issues that originate in school districts, cities, regions or counties. Any unit, council or district PTA may recommend action on state-wide legislation to the California State PTA Board of Managers.



Authority to Act

PTA members at the unit, council, district or state level must have PTA authority in order to advocate in the name of PTA.

- PTA establishes authority for action through the association's bylaws, the **purposes of the PTA, position statements** adopted by the California State PTA Board of Managers, and through the **legislation platform** and **resolutions** approved by delegates at the California State PTA Annual Convention.

The **legislation platform** is reviewed and approved by the membership every two years at the state convention, and is the framework for PTA action on legislation and statewide ballot measures.



The areas and scope of the legislation platform are guided by **resolutions** adopted by delegates at convention, position statements adopted by the Board of Managers, and by resolutions, position statements and directives from National PTA.

Local advocates must research PTA authorities prior to taking action. Check to see if California State PTA already has taken a position regarding your concern or a closely-related issue. Resolutions and position statements are listed online at the California State PTA website and in the *Toolkit*.

If there is an adopted PTA position on an issue, that position can be used as authority to advocate in the name of PTA.

If there is no prior adopted PTA position on record, the next step is to conduct a study. Your PTA will appoint a study committee to gather facts, investigate carefully and prepare a final report. The procedures for making a study are described in the *California State PTA Toolkit*.

California State PTA Advocacy

Like all levels of PTA, the California State PTA legislation team is comprised of volunteers. Proposed legislation and ballot measures are carefully studied, then thoroughly discussed and debated before positions are taken, based on the authorities established by our membership.

The **California State PTA legislation team** includes the **director of legislation** and **legislative advocates** who specialize in specific issues regarding **education, family engagement, budget, community concerns and health**. There is also a **federal advocate** and several **consultants**.



California State PTA commissions are responsible for preparing background information and authority for bills in their subject matter area and for recommending appropriate action. Advocates from the legislation team select bills to be studied and considered for action by the Legislation Action Committee.

The **legislation action committee**, acting on behalf of the California State PTA Board of Managers, meets several times each year during the legislative session to discuss the bills and subject matter recommendations, and to determine positions to

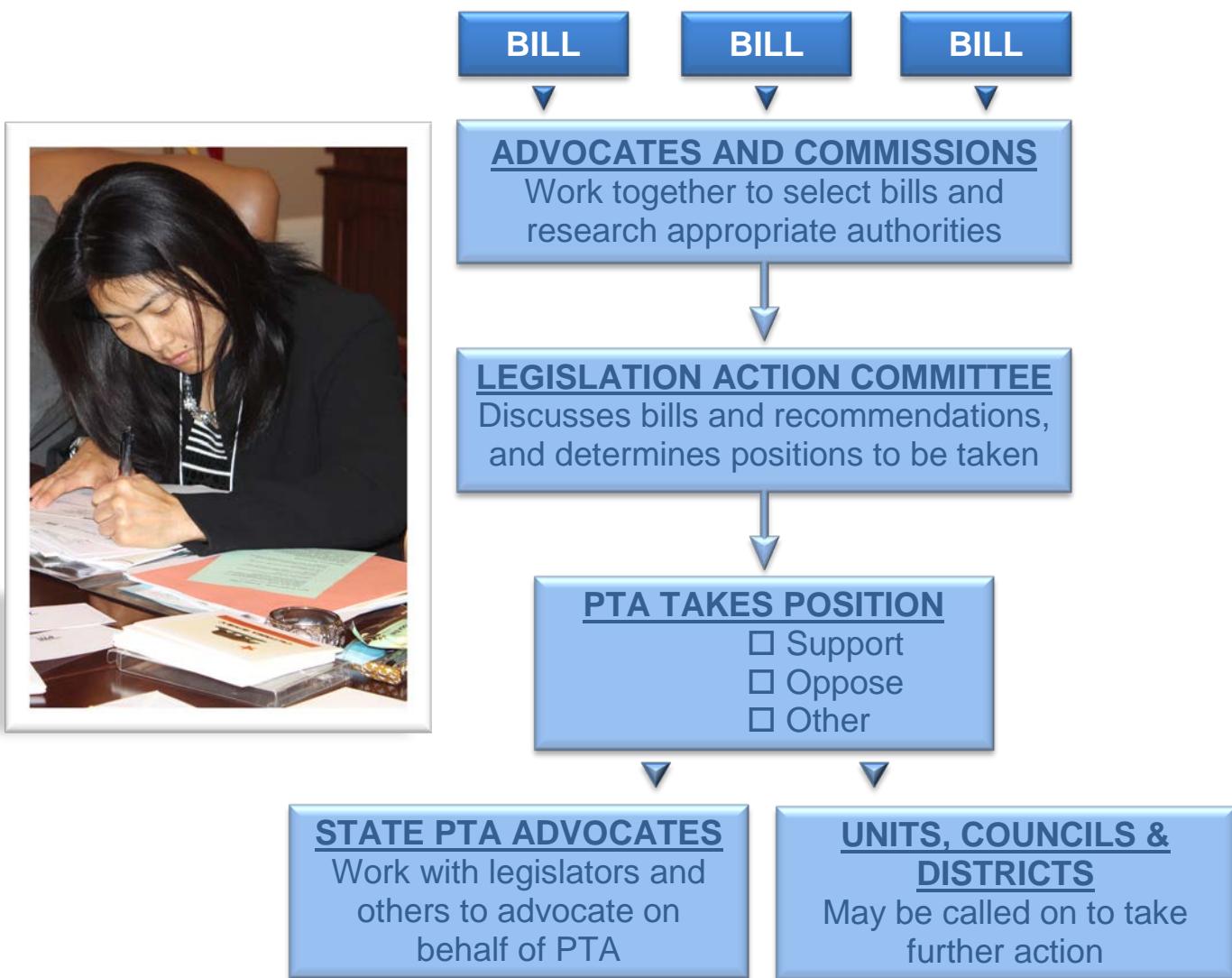
be taken on selected bills. Reports on the current status of legislation for which PTA has taken positions can be viewed on the California State PTA website.

The **California State PTA legislation team** is responsible for all further actions on the legislation once a position has been adopted. The PTA legislative advocates may work directly with the state legislators and their staff members of allied organizations and other interested parties on bills selected for PTA advocacy.

Unit, council and district advocacy teams and all PTA members may be called on to engage in an advocacy campaign on important statewide issues. The California State PTA legislation team will provide all information and materials that local advocates might need.

See diagram, next page >>

Action on bills



STRATEGIES FOR SUCCESSFUL PTA LEADERS



You have been appointed or elected to serve as the leader of your PTA advocacy program. This means your PTA colleagues recognize your interest in advocacy issues as well as your leadership abilities.

You may want to form an advocacy committee or team to work with you. Please check with your PTA president to see what your bylaws say about forming a committee. It is especially important that members of the advocacy team understand the mission, values, purpose and basic policies of PTA, and are able to work for the greater good of all children and families.

Importance of Setting Common Goals

Your role as the leader is to inspire and encourage others to work to achieve **common goals** aligned with those of PTA and that your members help to define.

- Goals help you to be more efficient and more effective. Goals set direction, and give purpose and accountability while providing direction and focus.
- Goals should have wide appeal. Goal setting by your team will provide opportunities for input that promote feelings of ownership in your PTA and school community.
- A goal is a destination. It should be written, relevant, attainable, observable and a broad statement of a desired end.
- Establish your team's goals early, and review them often. Goals may always be updated.

Effective and Successful PTA Leaders

Have a vision: They know the value of PTA to all children and families and think of how to define goals and achieve successful implementation of those goals and values.

Are passionate: They enthusiastically engage members to recognize and appreciate the purpose and mission of PTA and how you can make a difference.

Focus on priorities: They know the legislative priorities of PTA and align local priorities with them. Leaders stay on track and when diverted by trivial things, refocus and redirect everyone's eye to the ultimate goal – what is best for the children and youth of California.

Communicate: Leaders are clear and concise, whether it is in a meeting or through email.

Delegate responsibilities: They empower others by giving team members responsibilities and by assigning tasks that play to individual strengths, abilities and area of interests.

Allow others to reach goals their own way: Leaders do not micromanage or alienate individuals. They build the momentum that propels positive participation forward.

Groom future leaders: They give talented individuals opportunities to gain experience, acquire new skills and grow.

Share leadership: Leaders invite people or groups with similar goals to partner with you to further the vision you share.

Listen: They work hard to understand the individual needs and motivations of others on your team without pre-judging.

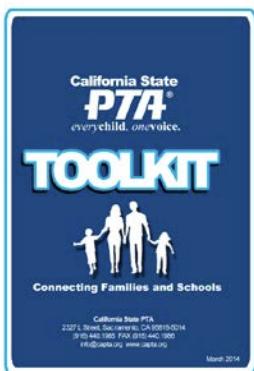
Act decisively: Leaders make the necessary decisions to move the meeting or a project forward.



Recognize contributions: Leaders give credit to individuals for their efforts and contributions. A little acknowledgment goes a long way.

Embrace change: Leaders understand when change is unavoidable and don't waste time lamenting it. Help others get through the change.

Use the California State PTA Toolkit: Learn about PTA policies, procedures and practices, as well as past advocacy efforts and successes.



Maintain a procedure book: Review the procedure book from the prior advocacy leader; keep it updated and pass it on to the next advocacy leader.

Keep your PTA president informed: Discuss and obtain approval for all plans and activities. Be sure to include your president!

Ask for help: The California State PTA leadership team is here to help you be successful. Don't be afraid to ask for guidance and assistance.

SECTION 5

ADVOCACY LEADERSHIP FOR DISTRICTS AND COUNCILS

Role and Responsibilities of the Advocacy Chair



District and council advocacy chairs demonstrate leadership on children's issues by educating PTA members, community members and elected officials about PTA's issues of concern and legislative priorities and goals.

District advocacy chairs are responsible for trainings and events that predominantly support district and councils (with outreach to units as needed.)

Council advocacy chairs support activities within their council as well as at the unit level.

The advocacy chair may be elected or appointed by the president, as defined in your bylaws. You will need to work with the president and executive board to develop the advocacy program.

The job description of the *Legislative Advocacy Chair* lists some of the common activities of PTA advocacy teams throughout California. (You can find it in the *California State PTA Toolkit* or in the appendix of this guide.) It is not intended as a checklist of everything that you must do each year. Your team and PTA board should determine which activities in the job description fit the needs for your area. **You are not required or expected to do everything listed in the job description.**

There are a few things that **all** advocacy chairs should do:

- **Request that advocacy is on the agenda of every meeting:** Give a report on the current issues impacting children as well as a legislative update. Report on your advocacy team's activities and on upcoming events.
- **Write articles for your PTA newsletter and website:** Make sure you have an article in every newsletter and that the website is current! This reinforces the importance of advocacy to a broad audience. Both California State PTA and National PTA produce a lot of written information, which you are free to reproduce and distribute as needed.
- **Take action on legislative alerts:** When you receive an action alert from California State PTA or National PTA, take action yourself and ask your leaders and members to do the same.

Develop an Advocacy Team

Your job as the advocacy chair will be much more manageable if you have a team working with you. You will need to work with the president and executive board to help you identify potential team members. The size and capacity of your team will be based on the resources available.

Assembling Your Team

The following are things to consider:

- What is a reasonable size for your team?
- Does each potential team member have an interest in advocacy or legislative issues?
- What skills or expertise does the person bring?
- Will the person work well as part of a team?
- Can you find representatives of most or all areas of your district who reflect the diversity of your district?

Look for team members who have some level of involvement and a demonstrated commitment to PTA. Interested members of your community may also be great additions to your team; however, be sure that they become PTA members!



Grassroots advocacy at the council and unit level encourages parents and community members to work toward making changes, bringing new programs and improving local policies and procedures for their school communities. PTA advocacy leaders are a good resource to help them with the process. Engaging with active parents and community members is an opportunity to expand local PTAs and to find interested individuals for PTA leadership positions.

Your Team is Ready

- Have an introductory meeting.
- Determine what your primary activities will be and assign tasks (see examples below).
- Create a contact information sheet.
- Set up regular meetings for both planning and evaluation purposes.
- Use technology to facilitate meetings and communications.

Examples of Possible Position Assignments

- Training coordinator
- Roundtables/programs coordinator
- Speakers bureau scheduler
- Advocacy newsletter editor
- Scheduler of local legislator visits
- Sacramento trip planner
- Community relations contact

Set Clear Team Goals

Clear and realistic goals allow your team to stay focused and on track, especially if conflict or challenges arise. Goals will also help you manage expectations, workload and time.

When developing goals with your team, think about the priorities or “hot topics” for your schools and families. Your goals may focus directly on those issues or your team may want to take a broader approach and support goals that closely align with those of California State PTA or National PTA.

As the leader of your team, seeking the team’s input and help with developing appropriate goals is important. The *Toolkit* job description will give you ideas about the types of activities that might interest and excite your team members.

Your team members will determine how many goals they can reasonably accomplish. Much will depend upon their level of experience and time availability. Remember to include your PTA president in your planning process.

Your goals can be:

- Short-range goals that can be accomplished almost immediately or within a short time frame.
- Intermediate goals that can be accomplished in the interim between short- and long-range goals.
- Long-range goals are more involved and can be accomplished by the end of the term.

It is better to set fewer goals that are attainable than multiple goals that will overwhelm your team. Once you agree on your goals, you should develop an implementation plan to achieve each goal.



Remember that goals should be written, relevant, attainable and measureable. Periodically review your goals and assess your progress. Your team can adjust your plans whenever necessary.

EXAMPLES OF GOALS

DISTRICT Example:

Create an action-oriented, knowledgeable and effective PTA advocacy team, including all council and unit legislative chairs, so they are empowered to speak out on behalf of all children and youth.

- Identify enthusiastic and motivated individuals and invite them to join the advocacy team.
- Hold an advocacy orientation or training for them. (Contact California State PTA for assistance if you’d like.)
- Update the team on current issues regularly.
- Provide communication tools and guidance to help them in their advocacy efforts.
- Hold regular meetings with council advocacy chairs.
- Study issues, and plan and implement advocacy campaigns together.

DISTRICT Example:

Promote strong working relationships with your elected officials at the local, state and federal levels so they understand PTA's position on upcoming legislation and so that children's issues become a priority for them.

- Schedule at least one meeting with each of your state legislators at their local offices to discuss legislation or concerns. Include council advocacy chairs when appropriate.
- Invite county school board members to speak at advocacy team meetings.
- Offer advocacy expertise and PTA resources to your state legislators.
- Set up at least one meeting with each of your county's federal representatives in their local offices.
- Schedule a trip to Sacramento for a PTA delegation to meet with legislators in their Capitol offices.
- Respect PTA's nonpartisan policy at all times and in all interactions with elected officials.

COUNCIL Example:

To advocate for continued access to visual and performing arts programs for all students, and for including arts as an essential and integral part of the school curriculum.

- Select a chairperson and a committee that may include teachers, students and community members.
- Meet with school district staff to learn about existing programs.
- Identify community resources that support arts education.
- Study PTA authorities on arts education and prepare a resolution, or a statement of support, for the school board.
- Present the school board resolution, or statement of support, at a PTA council meeting for approval.
- Present the resolution, or statement of support, to the school district board of trustees.



Establish a Budget

As the advocacy leader, you want to make sure that your team has the financial resources to accomplish your goals. Your president can provide information about prior advocacy budgets. You may use that as the basis for developing your budget, or start over with your own budget. It is important to know that you may not get everything on your budget wish list.



Typical advocacy budgets may include costs for copying, office supplies, training materials, hospitality and attending conferences such as the California State PTA Legislation Conference and the California State PTA Annual Convention (especially when it is in your local area).

The largest advocacy expense in council and unit budgets may be for the California State PTA Legislation Conference, which is a two-day event held in Sacramento. Registration fees are about \$200 plus air travel and accommodations. (Plan for a total cost of \$600 per person. In some cases, the council president and/or executive vice president may wish to participate in certain advocacy events, so it is a good idea to determine if those costs would come out of the advocacy budget or another line item in the overall budget.)

The California State PTA Annual Convention is a great place for members to learn about advocacy and to get excited about PTA. Councils and units may want to include convention expenses for members to attend.

Making advocacy a budget priority emphasizes that advocacy is, in fact, a priority for all PTAs.

SAMPLE PTA ADVOCACY BUDGET

DESCRIPTION	PURPOSE
General Advocacy	Supplies, copies, etc.
Advocacy Roundtables	Hospitality, copies, etc.
Training Event	Training materials, hospitality, etc.
California State PTA Legislation Conference	Registration, travel and accommodations in Sacramento, about \$600 per person total.
Conferences and Events	EdSource, other educational events
California State PTA Annual Convention	Registration, travel and accommodations may be as much as \$800 per person. (Cost will vary depending on the location of convention.)
TOTAL	See Note Below

NOTE: In order for PTAs to retain tax-exempt status and continue to receive tax-deductible contributions under Internal Revenue Code (IRC) Section 501(c)(3), they may not devote more than an insubstantial part of their activities to influence legislation. This is generally understood to be an amount not to exceed 5 percent of the total budget.

Plan Your Advocacy Program

An effective and successful advocacy effort requires a knowledgeable and motivated team.

At the **district level**, training and support for your council and unit advocacy chairs will be one of your top priorities. At the **council level**, you will concentrate on helping units.

Once informed, your team can begin to plan an advocacy program that will vitalize the purposes of PTA: *to promote the welfare of children and youth and to secure adequate laws for the care and protection of children and youth.*

District, council and unit PTAs are responsible for taking action on local issues originating in counties, cities and school districts. Many of your plans will focus on important local issues. Your team may also be called upon to support California State PTA and National PTA advocacy campaigns from time to time.

Your PTA must approve your advocacy program. It is a good idea to include your president in your planning sessions when creating your program.

FOR DISTRICT ADVOCACY LEADERS

Get your team in place.

- See suggestions under "Assembling your Team."

Train the team.

- Conduct sessions for both new and experienced advocacy chairs. (*Your district board may provide officer training for all elected officers, chairs and committee members in your area. A session on advocacy may be part of that, or you may hold a separate workshop for advocates.*)
- Invite speakers such as your state PTA leaders and local education experts.
- Provide materials that support training topics.
- If possible, attend the California State PTA Annual Convention and participate in advocacy-related workshops.



Host Advocacy Roundtables/Informational Sessions.

- Invite experts and community leaders to speak on current topics to keep PTA members informed. These sessions should be free and open to all PTA members.

Promote attendance at the California State PTA Legislation Conference in Sacramento.

- Budget for registration, accommodations and travel expenses.
- Participate fully in all sessions and legislator visits in the Capitol.
- Prepare and present reports to members back home on what was learned.

Communicate regularly.

- Publish a monthly newsletter.
- Create information alerts (use California State PTA and National PTA as resources).
- Use your PTA website and social media platforms to inform members and promote advocacy.



Plan to meet with your legislators and others on important issues facing the children, families and schools in your PTA area. (See appendix for tips on Visiting Your Legislators):

- Visit legislators at their local offices.
- Visit legislators in Sacramento.
- Meet with county staff and officials involved in children's health and welfare.

Reach out to other local organizations to forge alliances on issues affecting children.

- Collaborate with community and agency leaders to create awareness of important issues and to take action on issues, when appropriate. (See Toolkit for guidelines).

Submit letters to the editor.

- Highlight PTA's position on an issue. This needs to be done with your president's approval.

Offer to make presentations on advocacy issues to your councils.

- This would be upon request and could be on any advocacy topic related to children and youth.

FOR COUNCIL ADVOCACY LEADERS

Give a clear, concise report at every council meeting and encourage unit leaders to do the same.

Promote advocacy training for all PTA council board members and unit advocacy chairs.

- If your PTA district offers advocacy training, encourage attendance and carpooling.
- Encourage the use of California State PTA and National PTA online advocacy resources, including webinars.
- Plan to attend the California State PTA Legislation Conference.
- Plan to attend advocacy workshops at the California State PTA Annual Convention (especially if it is local to you).
- Share information about events and programs of interest to PTA advocates, including EdSource, county department of education programs, etc.



Meet regularly with unit advocacy chairs at a convenient time and location (invite all council board members and unit presidents).

- Invite guest speakers to talk about local, state and federal issues. Experts from your school district or county department of education and community leaders make great guest speakers.

Create a communications plan.

- Use websites, social media, advocacy alert emails and existing PTA resources to keep members informed.
- Learn your school district policies on distribution of information to students and parents.
- Share timely information quickly.

Meet with the superintendent of your school district.

- Work with your council president to request and schedule meetings with your superintendent.
- Share information on PTA advocacy priorities and action plans. Your superintendent may also share information with your team. Be prepared with an agenda and always be respectful of the position and the superintendent's time.

Get to know your school board.

- Encourage attendance at school board meetings. You can coordinate a schedule so at least one or two people attend each meeting and can report back to the team.
- Speak at a school board meeting on an issue or topic important to your PTA. Your council must approve this action if you are speaking as a representative of PTA.
- Invite school board members to attend and/or speak at your meetings. (*Note: No campaigning is permitted.*)

Schedule meetings with your state and federal representatives in their local offices.

- Introduce your local PTA advocates and share PTA positions on legislation.
- See appendix for tips on "Visiting Your Legislators."

Invite legislators/policy makers/elected officials to visit a local school.

- Obtain the approval of your PTA board and permission from your school principal. This is a powerful way to inform officials about what is actually happening in your school and also provides PTA the opportunity to share its perspectives.

Be prepared to "take action."

- Be familiar with PTA procedures when members want to get involved with an issue. You may need to make a study before taking action.
- Review the advocacy section of the *California State PTA Toolkit* and work with your PTA district advocacy chair to create an action plan for local issues.



- Represent PTA in the community and media when appropriate, with council approval.
- Implement and support “take action” campaigns when notified by California State PTA and National PTA.

Share results of “take action” campaigns.

- Provide progress reports to everyone involved in the campaign.
- Invite participants to attend school board meetings or press conferences with elected officials when results are announced.
- Celebrate successes.
- Debrief and revisit the issue if the outcome is not what you expected. A different approach might be appropriate to get what you want. Keep trying!

Speak at meetings of local organizations.

- Appropriate forums are local chambers of commerce, business councils, service clubs, etc.
- Provide information about your PTA’s purpose and programs, challenges your school or district is facing, and your PTA’s efforts to address those challenges.

Submit letters to the editor.

- Explain PTA’s position on an issue. This needs to be done with PTA’s approval.



Recruit Advocacy Chairs

Councils and units have much to focus on, and advocacy can sometimes get lost. As the advocacy chair, you may need to assist local PTA leaders with making advocacy a priority at their councils and units. Filling advocacy leadership positions at councils and units will ensure the legacy of PTA lives on for future generations of children and youth.

District chairs meet with your incoming council presidents.

Council chairs meet with your incoming unit presidents.

Be sure to cover the following:

(Note: Always coordinate this with your district/council president.)

- Encourage them to make advocacy one of their priorities.
- Share that PTA began as an advocacy organization and accomplishments include: securing child labor laws, Kindergarten in public schools, school lunches, tobacco and drug education, and much more.
- Explain how advocacy can pay off in a big way for all children. Your PTA unit may work long and hard to raise money for your individual school, but effective advocacy can lead to increased funding, services and programs for all children in California, including your own.
- Suggest they subscribe to National PTA and California State PTA legislative alerts.
- Share your goals for the advocacy program.
- Offer to provide training and resources for their advocacy leaders.
- Share that the meetings will be convenient and accessible to their advocacy chairs.
- District chairs offer to visit councils and council chairs offer to visit units to talk about the success of PTA advocacy programs.
- Request that their councils and units budget for advocacy expenses.
- Offer support and assurance that small steps can lead to great things for children and youth.



Do not be discouraged if not everyone is able to find an advocacy chair. As the advocacy chair, you may be the one who communicates throughout your area on advocacy issues.

Advocacy tends to be a longer-term endeavor, often with less than tangible results. Successful advocacy can result in a stop sign on the corner paid for by the city, or legislation that brings more money to schools. Advocacy can be a very rewarding and enriching experience for members who get involved and take action.

Remember: No amount of fundraising can have as much impact as a single piece of legislation!

SECTION 6
ADVOCACY IN ACTION!

Action on legislation or youth-related issues is an integral part of PTA work. In addition to leading your advocacy team, you will also organize advocacy campaigns and events involving active participation by PTA members.

This section provides ways to take action. Please view this as a list of possible activities, rather than a “must do it all” list, and select any activities that seem appropriate for your members.

As always, all actions must first be approved by your PTA.

Letter Writing/Postcard/Email/Phone/Fax Campaigns

Interaction between any elected official and his or her constituents is a crucial part of the democratic process. This is especially true for members of an advocacy organization such as the PTA. A correspondence campaign in any form educates PTA members about the issues, publicizes the organization and alerts legislators to PTA’s views.

An Official Letter

- The president or advocacy chair may wish to express PTA’s position or concerns on an issue in an official letter to a legislator from the PTA.
- The text should accurately address the specific issue with background facts, PTA’s position and what PTA wants to happen (For example, change in regulations or new legislation). Include the number of PTA members the writer represents.
- When writing to an elected official, you should:
 - Be succinct: a one-page letter, with no more than three paragraphs is best.
 - Create a separate letter for each issue or measure.
 - Address the letter with proper titles.
 - Include the bill number, author and a brief description of the bill.
 - Be specific about how the legislation would affect your school district and/or community.
 - Be willing to share any expertise and explain your connection with the subject.
 - Be positive and don’t ask for the impossible.
 - Sign your full name and give your complete address and telephone number.



Send copies of the letter to other contacts, such as key legislative committee and subcommittee members as well as the district advocacy chairs, California State PTA director of legislation and, when writing about issues before the Congress, to the National PTA office of governmental relations.

Email

When the issue is urgent, sending an email to the legislator is an effective way to communicate the PTA message. The message should be as short and concise as possible.



Make sure the important information contained in your email jumps out. You can do this by putting the action you are requesting in the subject line (For example, YES on SB 837). Even if the member or his/her staff does not take the time to read your email in its entirety, they will tally the number of messages received from their constituents on that issue.



Phone Calls

Phone calls are one of the more effective communication strategies, particularly when timing is critical, that is, when a legislator will be voting on a measure within the next 48 hours.



Following are some tips on using the phone to communicate PTA views:

- Provide a script for your members.
- Phone the legislator's district or capitol office and request to speak with the member or an aide.
- State your name and that you live in the legislator's district.
State PTA's position on the issue and urge the legislator to vote for the PTA position.

Fax

Faxing a letter is a quick, effective method for making PTA's position known in writing. Many legislative offices have publicly listed fax numbers.



Please note that a personalized letter carries more weight than a form letter, although both have value.

*For more tips on organizing a letter-writing campaign, please go to:
www.cpta.org*

Sample letters, emails and phone scripts may be found at: www.pta.org

Local Advocacy Campaign Strategies

When your PTA council or district has determined that there is a need to take action on a local issue, following the completion of a study; that it fits within the framework of the *Purposes of PTA* and the legislation platform; adheres to PTA policies; affects the well-being of children and youth and has the necessary approvals, here are the steps to follow.



Six steps for local advocacy

1. Establish the objective: *the victory you want to achieve.*
2. Determine resources: *what you have to put into this (For example, time, money, etc.).*
3. Identify potential partners: *who else cares about this problem enough to join the effort?*
4. Define obstacles: *what and who may challenge your campaign?*
5. Select targets: *those who can give you what you want.*
6. Decide on tactics: *the things that you and your allies must do to get the decision-maker(s) to agree to what you want.*

See "PTA Strategy Chart" in the appendix.



Host a Candidates Forum

A candidate event is a great way to engage your community around an upcoming election, to build support for issues that matter to PTA and to learn more about the candidates.



It is very important to remember that PTA is a nonpartisan organization. This means PTA does not support or oppose candidates. All of the candidates at your forum must be treated equally. This encourages candidates to participate and provides voters with unbiased information about potential officeholders. Maintaining a nonpartisan stance is also required by the IRS to protect PTA's nonprofit 501(c)(3) status.

Because PTA is nonpartisan and has the best interest of children and the community in mind, your forum is a vital opportunity to increase public understanding of the democratic process and the issues affecting your community.

Careful planning is essential to hosting a successful forum. Your PTA should start well in advance to secure a location, notify candidates and arrange for volunteers. Make sure the event is well-publicized ahead of time to ensure a good turnout.

It is often helpful to partner with another nonpartisan organization, especially one that has experience with hosting candidate forums. Both the League of Women Voters California (www.lwvc.org) and the American Association of University Women California (www.aauw-ca.org) routinely host candidate forums, so they are well versed in the do's and don'ts. They can also provide an impartial moderator - one who is not a voter in your district if it's a contentious election.

Both National PTA (**in cooperation with Nonprofit VOTE**) and California State PTA have produced excellent guides on how to host a candidate forum. Respectively, they may be found at:

- <http://pta.cms-plus.com/files/HostingACandidateForum.pdf>
- <http://www.capta.org/sections/advocacy/organizing-forum.cfm>

"Organizing a local candidates forum" from California State PTA and a suggested timeline prepared by National PTA illustrating how far ahead you should start planning may be found in the appendix.

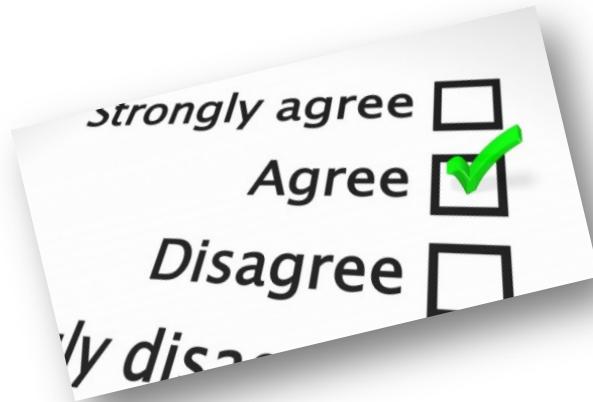
Candidate Questionnaires

Another way to educate voters is to send candidates a list of questions about key issues and publish their responses. Questions should be issue-focused and not targeted at an individual candidate. When done properly, this method is in compliance with the National PTA nonpartisan policy. It may be done in place of, or in addition to, a candidate forum.

Your PTA should develop the list of questions and send it by certified mail, with return receipt requested, to all candidates. The receipts should be retained for one year after the election.

You may request that responses be limited to a certain number of words, to ensure that all responses are of similar length. Include a specific due date with the questionnaire. Candidates who do not respond by the due date will not be included and should be noted as not responding in the published materials.

Do not edit any of the responses. Publish the answers in their entirety in unit, council and district newsletters or as a separate publication. Be sure to adhere to school district policies for the distribution of these materials.



Organize a Local Rally



Organizing a rally can be a highly effective advocacy tool. A rally can energize your members to work on advocacy activities. It can attract the press, so that community members become informed about our issues and positions. A rally is also an opportunity to be heard by legislators. Plus, a rally can be fun!

Ideas for organizing a rally

- **Decide on the purpose** of the rally. What is your message?
- **Decide on a date, time and location.**
- **Obtain approval** for the rally from your PTA and record it in the minutes (necessary for insurance).
- **Obtain any necessary permits** from the school district or the city/town.
- **Invite speakers (2-3 minutes each).** Options include:
 - PTA president
 - Local legislators or their staff
 - School superintendent
 - School board members
 - Teachers
 - PTA advocacy chair (good for wrap-up)
- **Select a moderator**, someone who can keep the rally on track.
- **Invite the press**, including TV, news stations, radio and newspapers.
- **Publicize the rally** to parents and the community.
- **Make signs.**
 - These can be hand painted.
 - Affix to paint sticks (request from a painting supplies store) with staples.
- **Hold a letter-writing campaign** with sample letters available at the rally.
- **Sign up new members to PTA** at the rally. Prepare for handling cash and bring membership cards.
- **Record and photograph** the event for PTA websites and social media.
- **Let California State PTA know how it went** by emailing legislation@capta.org and communications@capta.org



Voter Registration Drive



Your PTA may choose to promote voter registration and to conduct a registration drive. This is a nonpartisan activity and it is fine to do on school district premises, with the necessary approvals.

You can encourage and promote registration by having registration forms available at the information desk in your school office or at a PTA meeting. Registration forms are available in many languages from the county registrar of voters. Be sure to obtain forms in the languages commonly spoken in your community.

Remember that in California, 17-year-olds who will be 18 by the next election can register to vote.

Planning a voter registration drive

- Do the bulk of your registration activities in the two to three months before the election registration deadline.
- Contact your local county elections office:
 - Obtain important deadlines and post them at school, in newsletters, on websites and social media, etc.
 - Ask if they will train people to register voters.
 - Request all necessary materials.
- Select times and venues where there will be a high volume of people such as Back-To-School Night or Open House.
- Complete the required facility use forms when using any school facility.
- If the county elections office does not provide training, please refer to the California Secretary of State website as there are very specific rules for registering voters.
- Make arrangements to turn in completed voter registration forms.

Voter registration can also be an on-going activity

- Combine voter registration opportunities with other PTA activities.
- Encourage voters to update their registration if they have moved.
- Include a voter registration form in new-parent packets.
- Plan an event for National Voter Registration Day – September 23.

National PTA has coordinated with Nonprofit VOTE to provide a voter registration tool for all PTAs. For information, go to the PTA website or to <http://www.nonprofitvote.org/new-voter-registration-tool/>.

The California Secretary of State website has an excellent guide to running a voter registration drive at: <http://www.sos.ca.gov/elections/guides/guide-to-vr-drives.pdf>

School Bonds and Other Ballot Measures

A PTA may be asked by the local school district to help secure the passage of a school bond or local parcel tax, or to participate in campaigns to pass or defeat other election ballot measures. Unit, council and district PTAs may participate in these efforts when the local PTA board and membership have voted to support such a campaign after studying the language of the measure.



The district advocacy chair or the California State PTA director of legislation can help local PTA leaders understand the role of PTA in these campaigns.

PTAs can be most effective by:

- Taking an active role in planning the campaign.
- Providing knowledgeable volunteers to help inform the community.
- Developing and/or distributing campaign material.
- Making use of radio, TV and print media, including newsletters, editorial board visits, letters to the editor and other communication resources such as PTA email and web pages.

A PTA may spend a portion of its funds on election issues that have an impact on the education, health, or well-being of children and youth, as long as the rules applicable to nonprofit organizations are followed.

Details of legal guidelines for campaign activity for bonds, parcel taxes and ballot measures may be found in the *California State PTA Toolkit* under “School Bond Campaigns.”



Write a Convention Resolution

Resolutions call attention to a problem and a need for action on a particular issue. They are a major source of policy for the California State PTA and its units, councils and districts. They are voted on by our convention delegates. If a problem or situation has statewide implications affecting children and youth and warrants PTA action, a convention resolution is one way to provide authority for action. (*See Section 3, Authority to Act.*)

Unit, council and district advocacy chairs may want to collaborate when writing a resolution, since it is an involved process and this would be a way of sharing the workload.

A convention resolution may be initiated by a PTA unit, council or district in good standing, an inter-district committee or the California State PTA Board of Managers. The same criteria apply to everyone. The resolution is an original main motion and must be submitted in writing.

Resolutions must:

- Be in accordance with PTA purposes and policies.
- Be prepared according to criteria specified in the *California State PTA Toolkit*.
- Be well-researched using credible and current information from multiple independent sources.
- Follow National PTA guidelines, if the resolution is to be forwarded to the National PTA.



There are three parts to a resolution:

- **Preamble.** The preamble is a statement of fact containing background information and reason(s) for the resolution. Each statement begins with the word *Whereas*. There may be more than one *Whereas* statement.
- **Request for action.** The request for action is a recommendation to the convention delegates on how to proceed with the issue set forth in the *Whereas* statement(s). Each request for action begins with the word *Resolved*. There may be more than one *Resolved* statement. Action requests are listed in separate *Resolved* statements.
- **Background.** The background summary is a narrative highlighting the most important facts from the resource material. The resource material is discussed later in this document.

The information above is excerpted from, "Procedure for Preparing a PTA Convention Resolution" committee guide. This guide may be obtained from the California State PTA website or upon request to the California State PTA office by phone or email at resolutions@capta.org. For videos containing the latest details on writing a resolution, please go to: <http://www.capta.org/sections/advocacy/understanding-resolutions.cfm>

SECTION 7
RESOURCES

PTA Resources

CALIFORNIA STATE PTA WEBSITE: www.capta.org

Advocacy Tab

Legislation Action Report: E-news summary of actions taken on legislation of interest to California State PTA, including general bill information and positions taken by California State PTA.



Legislative Alerts: Electronic updates on current legislative and other measures and issues that affect children and youth. Also provides opportunities to take action in support of PTA positions. Subscribe at www.capta.org

Sacramento Update: E-newsletter addresses state and federal legislation issues that affect California's children and youth. Sent by email to California State PTA Board of Managers, district presidents and interested PTA members. Subscribe at www.capta.org

Legislation Conference: A two-day visit to Sacramento that includes the latest information from legislators and key officials about important matters affecting children and families and visits with the legislators who represent your community.

General PTA and Leadership Information

PTA in California: The official newsletter of the California State PTA.

PTA Connects: A monthly e-newsletter sent by email all PTA members with news and updates.

Leadership Essentials: E-news sent regularly to all PTA officers with timely information and reminders about issues, tasks and responsibilities of PTA leaders at any level as well as tips for running your PTA.

California State PTA Toolkit: A comprehensive guide for all PTA leaders that includes a section on advocacy.

NATIONAL PTA WEBSITE: www.pta.org

Advocacy Tab

Information on National PTA position statements and federal legislative and policy agenda.

Advocacy Toolkit: Guide with strategies for advocating with federal legislators.

PTA Takes Action Network: Email updates on federal policy and action alerts.

Our Children: National PTA magazine.

Other Helpful Resources

Lawmakers

California Governor's Office www.gov.ca.gov

California State Legislature www.legislature.ca.gov

California State Senate www.senate.ca.gov

California State Assembly www.assembly.ca.gov

The White House www.whitehouse.gov

U.S. Senate www.senate.gov

U.S. House of Representatives www.house.gov



Informational Sites

California Budget Project www.cbp.org

California Legislative Information www.leginfo.ca.gov

Ed100 www.Ed100.org

EdSource www.edsource.org

Educational Data Partnership www.ed-data.k12.ca.us

Legislative Analyst Office www.lao.ca.gov

Congressional Budget Office www.cbo.gov

EdWeek www.edweek.org

Library of Congress, Federal Legislation <http://thomas.loc.gov/home/thomas.php>

National Center for Educational Statistics www.nces.ed.gov

Policy Implementation

California Department of Education www.cde.ca.gov

U.S. Department of Education www.ed.gov

California State Department of Finance www.dof.ca.gov

Voting information

California Secretary of State www.sos.ca.gov

Smart Voter (League of Women Voters) www.smartvoter.org

Your County Registrar of Voters (see SOS website for listing)

Media Information

Sacramento Bee www.sacbee.com/capitolandcalifornia

Rough and Tumble www.rtumble.com

Your local newspapers

SECTION 8
APPENDIX



***Job Description for
Legislative Advocacy Chairman***
(Toolkit 2014)

PTA is a child advocacy association. Its legislative mission is to speak on behalf of all children and youth at the local, state and federal levels. One of the purposes of PTA is “to secure adequate laws for the care and protection of children and youth.” PTA promotes and encourages legislative advocacy for the education and welfare of all children and youth.

ROLE OF PTA IN LEGISLATION

As local officers of the largest grassroots child advocacy organization in the state, PTA legislative advocacy chairs are responsible for demonstrating leadership on children’s issues at the local level by educating PTA members, community members and elected officials about PTA’s issues of concern and legislative priorities and goals.

The California State PTA takes positions on issues/legislation based on position statements in the *California State PTA Toolkit*, California State PTA convention resolutions, California State PTA Legislation Platform and National PTA positions and convention resolutions.

The unit, council or district legislative chair provides PTA members with information about PTA positions on current legislation and issues.

WHAT TO DO

In order to ensure your success, regardless of your level of legislative experience, we have broken out the “What To Do” sections by “Newcomer,” “Continuing” and “Advanced.” Please go to the section that best fits you, and remember to incorporate these actions even when you’re advanced!

Remember: No amount of fundraising can have as much impact as a single piece of legislation.

NEWCOMERS TO ADVOCACY

Please obtain materials from your predecessor and/or unit, council or district president. If no materials are available, please begin a new procedure book.

If you are new to advocacy, we encourage you to do the following:

- **Request that advocacy is on the agenda of every meeting and give a legislative report.** Share with PTA members about issues affecting the school and community as well as legislative activities at all levels of government. Remember we are a nonpartisan association, so please be objective and factual. Be sure to include PTA positions when appropriate. Circulate materials from council, district, state and National PTA when available. Have copies at PTA meetings or information on websites or links where the information can be found.
- **Write articles for your PTA newsletter.** Please observe Legislation Policy 11 which discusses guidelines for sending materials home with students.
- **Schedule at least one meeting per year with your elected representatives** to discuss your PTA's local issues of concern and legislative priorities of the California State PTA. Take a few members from your PTA with you.
- **Participate in one of the following:** a letter writing campaign, a postcard campaign, a rally to support a PTA position.
- **Attend some local school board meetings.** Communicate advocacy positions as authorized by your PTA board.
- **Establish a method for sharing PTA Legislative Alerts** and other important information with PTA members.
- **Take action on legislative alerts** from California State PTA and National PTA, and encourage other PTA members to do the same.
- **Maintain current contact information for all elected representatives** in your area: U.S. Senators, U.S. Congress member, State Senator, State Assembly Member, Board of Supervisors members, city council members and school board members.

Feel free to take advocacy actions from the other categories at any point that you feel ready.

CONTINUING ADVOCACY AND EDUCATION EFFORTS

If you have served as the legislative advocacy chair for one to two years at the unit or council level, you will likely be ready to take your advocacy to the next level. Please continue with all your *newcomer advocacy* actions and also add as much of the following as possible:

- **Organize a voter registration drive** annually. Remember to include new residents and high school seniors.
- **Organize a letter-writing, email** or call-in campaign to communicate legislative priorities to legislators one to three times per year. Provide a sample letter, email or phone script.
- **Encourage PTA members** to attend meetings with State Assembly and Senate representatives, meet with local government officials (For example, school board, city council members or county supervisors), and know the local policies and ordinances affecting children and youth.
- **Schedule at least one public appearance of unit, council or district representatives** to highlight California State PTA's legislative priorities and local issues of concern. Some examples of appropriate forums are school board meetings, the local chamber of commerce and meetings of local service clubs.

- **Submit at least one letter each year to the editors of local newspapers** on behalf of your PTA highlighting California State PTA's legislative priorities and local issues of concern (with signature of district, council or unit president).
- **Train your members to be advocates.**
- **Visit Sacramento** with other PTA members to meet with elected representatives and key education leaders.
- **Invite legislators, policymakers and elected officials** to visit a local school.
- **Establish contacts** with local individuals, groups, organizations and agencies to develop sources of information on local and statewide issues that affect the school, families and community.

Please consider advancing to the next level of PTA by volunteering to serve on your council advocacy team, or your district advocacy team.

ADVANCED ADVOCACY AND COMMUNITY EDUCATION EFFORTS

If you have been serving as an advocate for several years, you are ready to go to the advanced level! Please continue with all your *newcomer* and *continuing advocacy efforts* and add the following:

- **Meet with federal legislators** when they are in their local district offices.
- **Host a presentation on advocacy issues.** Invite a council or district PTA counterpart to present.
- **Organize a rally** to highlight a key PTA issue. Invite legislators and other speakers, as well as the press.
- **Invite the press to PTA advocacy events,** and publicize PTA advocacy activities and positions.
- **Organize a nonpartisan candidates forum** in cooperation with the PTA council and other local community organizations such as the League of Women Voters.
- **Consider authoring a resolution on an issue of concern to your PTA** to submit through appropriate channels to California State PTA or National PTA.
- **Provide leadership and support for PTA-approved local school bond and parcel tax campaigns.**
- **Organize/participate in a legislation study group** if a local issue arises (*How to Make a Study – Toolkit*). Consult with a council or district PTA legislation chairman to coordinate efforts with other PTAs in the area. Forward the findings to the appropriate PTA leaders, if the study involves a district PTA or state issue.

HOW TO STAY INFORMED

Sign up to receive regular email updates from:

- Your school district
- Your PTA council (if available)
- Your PTA district
- California State PTA – www.capta.org
- National PTA – www.pta.org

EVENTS TO ATTEND (*Attend as many as your schedule allows.*)

- California State PTA Legislation Conference
- California State PTA Annual Convention
- Council/district PTA-sponsored visits to Sacramento and other advocacy events
- EdSource Forum
- National PTA Legislative Conference held in Washington D.C.

HELPFUL WEBSITES/RESOURCES

California State PTA – www.capta.org

- **Legislative Alerts** (*please sign up on the website to receive email updates*)
- *PTA in California* newsletter
- *Toolkit* (*Available in both English and Spanish online or in print*). Chapter four covers advocacy and includes: local advocacy, elections, legislative program, legislation platform, listing of resolutions, position statements, policies and procedures.
- Resolutions Book

National PTA – www.pta.org

- **PTA Takes Action Network** (*please sign up to receive email updates on federal policy and PTA action alerts*)
- National PTA position statements and resolutions
- *Online Advocacy Toolkit, Federal public policy agenda and issue briefs*
- *National PTA Quick-Reference guide*
- *Our Children* – National PTA Magazine

Other helpful websites:

- California Budget project – www.cbp.org
- California Department of Education – www.cde.ca.gov
- California Secretary of State – www.sos.ca.gov
- Ed100 – www.Ed100.org
- EdSource – www.edsource.org
- Legislative Analyst's Office – www.lao.ca.org
- Official California Legislative Information – www.leginfo.ca.gov

If you need assistance, please contact your council or district legislative chair or the state PTA director of legislation.

Organize a Local Candidates Forum

1. **Form a committee.** Participation on this committee falls within the *Job Description for Legislative Advocacy Chair*.
2. **Determine whether PTA will sponsor the forum alone or with another nonpartisan organization,** such as the League of Women Voters or a branch of the American Association of University Women.
3. **Set the date, and obtain a facility** that is centrally located, if possible. If it will accommodate the number of candidates, a school district boardroom is an excellent location, and the physical environment, including audience space is, in most cases, already set up.
4. **Decide whether to videotape the forum.** This can be done through a local cable TV station, a high school video production class, or by a volunteer. Video can be uploaded to an online videosharing site and the PTA website. Some local government TV channels are willing to work in partnership with the League of Women Voters and PTA to tape forums for replay. Note: The camera should focus only on the moderator and the candidates.
5. **Draft invitations to candidates.** Be sure to include:
 - a) Complete information on date, time, and place;
 - b) Guidelines and ground rules for the forum (e.g., there will be only written questions, amount of time allowed for candidates' responses; topics of questions; forum format (including time for opening and closing statements, candidate order for statements and answers, etc.); rules prohibiting campaign literature distribution in the forum room; if the forum will be videotaped for replay on cable TV or displayed on a website; etc.);
 - c) A request for any information needed from the candidate for promotion of the forum; e.g., biography and photo;
 - d) Name, address, telephone number and email address of forum committee's contact person;
 - e) Due date for the candidate to respond.
6. **Candidate schedules are often hectic.** They may be contacted by many organizations with requests for information, personal appearances, and/or forums. Establishing a personal connection by calling all candidates or their campaigns to inform them about the forum, to extend an initial invitation, and to advise them to look for a more formal invitation in the mail can facilitate both the process of organizing the forum and communicating with the candidates.
7. **Obtain home addresses and email addresses of all official candidates** from the Registrar of Voters, and send invitations by certified mail with a return receipt requested. The signed, returned receipts should be kept on file.
8. **Determine physical arrangements:**
 - a) Provide adequate accessible seating for attendees.
 - b) Seating for candidates should be in the form of a head table, preferably elevated so they are visible to the audience. Seating assignments should be done by lottery with each candidate drawing a seat number prior to the beginning of the forum. The table should also be draped and water provided for candidates and moderator.
 - c) The moderator is the forum facilitator and may either stand at a podium or be seated at the table with the candidates. If the former, the moderator should be provided with a chair. If the

latter, the moderator must be seated in a location that allows for eye contact with all candidates and control over the forum process and decorum.

- d) Provide an adequate sound system with microphones available to rotate among the candidates, with a separate microphone for the moderator.
- e) Provide tables for any refreshments and for any literature pertaining to the forum, such as agendas, programs, packets of candidates' biographies and questionnaire responses.
- f) Follow facility use permit regulations concerning distribution of campaign literature. Note: If a table is provided outside the forum room for candidate literature, the opportunity must be offered to all candidates. The materials should not be made available until the conclusion of the forum to avoid having them brought into the forum room. It is generally a good idea to place a limit on the amount of literature any individual candidate can place on the table to maintain the nonpartisan nature of the overall forum environment.
- g) Provide a table for question sorters toward the front of the room. Timers should be located in the middle of the front row and visible to all candidates.

9. Identify volunteer responsibilities:

- a) Volunteers from PTA and co-sponsoring organizations that organize and/or staff the forum should have no personal ties to any candidacy, and shall not have publicly expressed support or opposition to any of the candidates.
- b) The forum committee should arrange for the following: greeters for both candidates and attendees; hospitality; person to open the forum and lead the Pledge of Allegiance – may be the moderator or president of the sponsoring organization(s).
- c) Secure a neutral moderator. Consider requesting a representative of the League of Women Voters or a respected political editor from the local media. The moderator or his/her organization cannot have casually or formally endorsed any of the candidates.
- d) Question Sorters – Enlist one PTA representative with no personal ties to any candidate, and one representative from each of the co-sponsoring organizations.
- e) Timers – one to keep track of time, and one to hold up signs to signal candidates.
- f) Two or three volunteers to hand out blank index cards, pick up questions and deliver them to the sorters.

10. Publicity – articles for the newspaper, radio announcements, cable announcements, fliers for PTA newsletters, etc.

11. On the day of the forum:

- a) Attendees enter, ushers provide blank index cards on which attendees may write questions for the candidates. Each index card should be used for only one question.
- b) Begin with Pledge of Allegiance, welcome and a statement of the nonpartisan policies of the sponsoring groups.
- c) Moderator should go over the basic forum guidelines and procedures that were distributed to all candidates, so the audience will also understand them and know what to expect. The moderator must specify the length of time allowed for opening and closing statements, if they are included, and must also specify the amount of time each candidate will be given to respond to each question. If the forum is televised, this statement will inform the home audience as well. The moderator will also include the following information:
 - i. The order of questions will be rotated among the candidates in random order.

- ii. Whether all questions will be in writing or if questions from attendees will be permitted.
- iii. All questions will be screened for relevance, to avoid duplication, and to assure adherence to the guidelines and ground rules. Personal questions or attacks on any candidate will not be acknowledged.
- iv. If a question is directed to a specific candidate, it must be issue-focused. The candidate will have a set amount of time to respond. All other candidates may have an opportunity to respond, if they so desire.

If a question is directed to all candidates, each candidate will have up to one minute to respond.

- d) Timers should hold up signs to signal speakers:
 - i. Green: start
 - ii. Yellow: 15 seconds left
 - iii. Red: stop
- e) The moderator should state that verbal interaction between the audience and the candidates during the forum will not be permitted. The forum is neutral territory for a sharing of philosophy, ideas and information, not campaigning.
- f) Begin forum. While candidates are giving their opening statements, screeners can begin sorting questions to be asked of the candidates. If questions have been received through outreach efforts prior to the forum, they should be included in the mix. After the opening statements, the moderator asks the candidates questions received from the question sorters. (Note: In the event attendance is small at the beginning of the forum, the moderator should have a few questions in hand that were collected prior to the forum. This is even more important when the forum is televised.)
- g) Moderator or other designee should close and thank cosponsors, the TV station and home audience, if applicable, and everyone in the forum audience for attending, reminding them of the election date and encouraging them to study the candidates and cast their votes.

CANDIDATE FORUM TIMELINE

4 MONTHS:

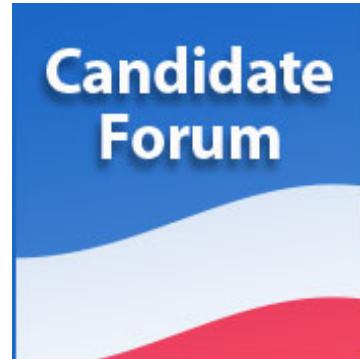
- Collaborate with other local nonprofits
- Set date, time, and place for the forum
- Decide on a forum format and a budget

3 MONTHS:

- Send invitations to candidates
- Make preliminary media contact

2 MONTHS:

- Begin volunteer recruitment
- Select a moderator
- Follow up on candidate invites
- Develop a strategy for turnout



1 MONTH:

- Final confirmation of candidates
- Reconfirm site arrangements
- Reconfirm volunteers
- Distribute promotional materials
- Contact media again to promote coverage

LESS THAN 1 MONTH:

- Continue to recruit attendees
- Contact volunteers to confirm their duties at the forum
- Final media reminders and press release
- Write op-ed piece
- Select a timekeeper
- Reconfirm candidates attendance

ON THE BIG DAY:

- Complete set-up at forum
- Have volunteers greet people
- Set up the head table
- Welcome and thank-you's
- Review ground rules for forum
- Make time for informal Q&A after the forum

AFTER THE EVENT

- Send thank-you letters
- Encourage/monitor news stories
- Write letters to editor or op-ed piece

PTA Basic Policies

The California State PTA Bylaws, Article III states:



"The organization shall be noncommercial, nonsectarian and nonpartisan.

"The organization shall work with the schools and community to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.

"The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration between parents, schools, and the community at large.

"No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, directors, trustees, officers, or other private persons except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.

"Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

"Upon the dissolution of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA.

"The organization or members in their official capacities shall not – directly or indirectly – participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

"The organization or members in their official capacities shall not endorse a commercial entity or engage in activities not related to promoting the Purposes of the organization.

"The organization shall not enter into membership with other organizations except such international, national, or state organizations as may be approved by the California State PTA.

"The California State PTA or any of its divisions may cooperate with other organizations and agencies concerned with child welfare, but a PTA/PTSA representative shall make no commitments that bind the group he represents."

Know the PTA, California State PTA Toolkit 2014



PTA Strategy Chart

Advocacy is the cornerstone of PTA's mission. In order to achieve your advocacy goals at any level, it is important to have a strategic plan. This chart poses the right questions in the right order and serves as a particularly useful tool for group discussions, as it maintains focus to the issue at hand. Use this chart as a guide to developing your strategy and revisit it to check your progress.

GOALS <i>The victory you want to achieve.</i>	ORGANIZATIONAL CONSIDERATIONS <i>What you have to put into the fight (time, money, etc.), and what you want to get out of it organizationally (how will others perceive you / the PTA).</i>	CONSTITUENTS, ALLIES, OPPONENTS <i>Who else cares about this problem enough to join in doing something about it? Who will not agree with you on this issue? Who does it impact?</i>	TARGETS <i>Those who can give you what you want. Always a person.</i>	TACTICS <i>The things that you and your constituents and allies must do to get the decision-maker(s) to make the decisions that will allow you to achieve your goal.</i>

From National PTA

Visiting Your Legislators

Group or individual contacts are among the most effective ways to communicate with legislators.

Take the following steps:

- **Schedule an appointment** or, if the elected representative is unavailable, arrange a meeting with the aide handling the issue. When making the appointment, specify how much time will be needed (*recommended time frame is 20-30 minutes*).
- **Arrange to have PTA constituents** of the legislator attend the meeting. This is extremely important, since they are naturally most interested in what is happening in their legislative district.
- **Draft an agenda** and be sure to list the issue(s) the PTA wants to discuss. If a group is making the visit, assign each person a role. For example, one person can open the meeting, another person can be the recorder, someone else can focus the conversation back to the PTA agenda when necessary and another person can leave literature.
- **Arrive on time.** The delegation should meet prior to the appointment and go in together. At the beginning of the meeting identify yourself and the PTA represented. During the introduction, state the issue(s) of concern. Keep the time frame in mind during the meeting.
- **Be prepared to educate the legislator** or aides about PTA's position. Providing relevant local examples is very helpful. Be open to questions. If you don't know the answer, politely explain that you will do some additional research and get back to them. Never give unverified information or assumptions. Personal credibility and the credibility of PTA are on the line.
- **Ask how the legislator will vote** on the issue. If the legislator is unable to make a commitment, tactfully state that you would like to know, and that you are willing to call at a later time to learn the decision. If the response is positive, respond, "We appreciate your support." If the response is negative, ask, "What are your specific objections?"
- **Ask questions and listen to the answers.** What are the legislator's interests and current priorities? Is he or she sponsoring any bills?
- **Develop a positive relationship** with legislators and their staff members. Communication should be a continuing exchange, not sporadic contact. A solid relationship with legislators and their staff members is an important step in building credibility and power for the PTA.

