

PTA Grassroots Advocacy Manual



PTA has developed and assembled this Grassroots Advocacy Manual to assist you in all your advocacy activities—whether at the local, state, or national level.

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At any given time, a PTA member may engage in a variety of activities that represent a spectrum or range of efforts in support of children—his or her own individual child, a group of children, or all children. We, as parents, usually start down the road of advocacy by speaking for our own children at parent-teacher conferences or with the school principal. We then begin to recognize that the other children in the classroom or school have similar needs. This continues to build until our activities reach advocating on the local, state, and national levels for all children.

The Parent Involvement component of PTA’s National Standards for Parent/Family Involvement Programs states that “parents are full partners in the decisions that affect children and families.” If we did not take our advocacy outside the school building or community, we would not be taking full advantage of the national voice PTA members have. Our strength is in our numbers.

Advocacy vs. Lobbying

What is the difference between advocacy and lobbying?

Although most people use the words interchangeably, there is a distinction between advocacy and lobbying that is helpful to understand. Advocacy is the act of mobilizing individuals to spark changes in programs and policies (changes that benefit children) at the local, state, and national levels. Much of what your local PTA is doing to improve laws, policies, and conditions in your community falls under this category. Lobbying refers specifically to advocacy efforts that attempt to influence legislation. The laws limiting the lobbying done by nonprofit organizations do not govern other advocacy activities.

What is the difference between grassroots lobbying and direct lobbying?

Grassroots lobbying focuses on appealing to the general public to contact the legislature about an issue. Direct lobbying is contacting government officials or employees directly to influence legislation. If an issue is to be decided through a ballot initiative or referendum, appeals to the public are considered direct lobbying, because the public in this instance acts as the decision maker. Nonprofits like the PTA may devote only 25 percent of their total lobbying expenditures to grassroots lobbying.

To find lobbying rules for nonprofits, visit www.clpi.org/Lobbying_and_the_Law.aspx.

Adapted with permission from the Connecticut Association of Nonprofits Advocacy/Lobbying Toolkit, available at www.ctnonprofits.org/pages/NonprofitResources/Advocacy_Lobbying_Toolkit.asp. Originally published in a different form by the Center for Lobbying in the Public Interest in “Lobbying and Advocacy—Similarities and Differences” and “Public Policy Related Activities That Are Not Lobbying,” www.clpi.org.

Setting the Stage for Advocacy

Advocacy is the act of mobilizing individuals to spark changes in programs and policies, that benefit children, at the local, state, and national levels. Much of what your local PTA is doing to improve laws, policies, and conditions in your community falls under this category. Here are some examples of this at the local level:

- Talking to all parents about the importance of their participation in their children’s education
- Sitting down with the school principal to discuss issues concerning parents and students
- Working with school officials to achieve PTA Parent Involvement Certification
- Monitoring the implementation of testing standards in your school
- Participating in a school board hearing highlighting the need to purchase new textbooks or computers
- Building a coalition of parents, school administrators, and community leaders to design meaningful after-school activities
- Distributing information about a school construction bond measure
- Serving on the committee responsible for designing a wellness policy for your child’s school

Parents play a major advocacy role by being full partners in all decision making affecting their children. Through this joint involvement, PTA members become energized and engaged. And, with the skills they acquire through local advocacy activities, members can work effectively with PTA state and national leaders to tackle larger efforts to improve the education and well being of all children.

On the national level, PTA’s advocacy efforts have led to positive changes in child labor laws, public health services, federal education laws, parent involvement policies, school lunch programs, juvenile justice protections, and mandatory immunizations. All of these changes occurred because of the consistent hard work and persuasion of PTA members just like you.

“Inside” vs. “Outside” Lobbying

Effective lobbying requires coordination of two very different kinds of lobbying activity:

“Inside” Lobbying

This form of lobbying takes place in the Capitol or directly with decision makers. It includes the following:

- Meetings with lawmakers and legislative staff
- Providing analysis and information to committees and legislative offices
- Testifying before a hearing
- Negotiating with policy makers and other lobby groups regarding specific parts of a bill

“Outside” Lobbying

An effective lobbying campaign also requires activity outside the Capitol, aimed at shifting the politics and exerting pressure around the issue. Some of these activities include:

- Media activity including news conferences, editorial board visits, letters to the editor, and assisting reporters with stories
- Organizing local lobbying visits by constituents to their legislators
- Building broad and diverse coalitions
- Letter-writing campaigns to legislators
- Activities such as organized rallies and marches

It is important that “outside” lobbying activities be coordinated with “inside” lobbying activity to ensure that they make strategic sense in terms of timing, targeting, and messages.

Adapted with permission from the Connecticut Association of Nonprofits Advocacy/Lobbying Toolkit, available at www.ctnonprofits.org/pages/NonprofitResources/Advocacy_Lobbying_Toolkit.asp.

Why Lobby? Ten Reasons to Lobby for Your Cause

1. **You can make a difference.** In Toledo, Ohio, a single mother struggling to raise her son without the help of a workable child support system put an ad in a local newspaper to see if there were others who wanted to work for change. There were. Over time, they built the Association for Child Support Enforcement, which has helped change child support laws across the country.
2. **People working together can make a difference.** Mothers Against Drunk Driving convinced dozens of states to toughen their drunk driving laws. As a result, the numbers of drunk driving deaths are lower nationwide.
3. **People can change laws.** History is full of people and groups that fought against great odds to make great changes through child labor laws, public schools improvement, clean air and water laws, and social security reform. These changes were not easy to achieve. They all took the active involvement—the lobbying—of thousands of people who felt something needed to change.
4. **Lobbying is a democratic tradition.** Telling our policy makers how to write and change our laws is at the very heart of our democratic system. Lobbying has helped keep America’s democracy evolving over more than two centuries.
5. **Lobbying helps find real solutions.** People thinking creatively and asking their elected officials for support can generate innovative solutions that overcome the root causes of a problem. Through this work, abused children have found rapid placement in safe homes, and restaurants have been able to donate excess food to food shelters.
6. **Lobbying is easy.** Lobbying is simple to master. In fact, you can learn how to lobby—whom to call, when to call, and what to say—in minutes. There are a few simple reporting rules to follow, but they aren’t complicated.
7. **Policy makers need your expertise.** Few institutions are closer to peoples’ real problems than nonprofits and community groups. Every professional lobbyist will

tell you that personal stories are powerful tools for change. People and policy makers can learn from your story.

8. **Lobbying helps people.** Everything that goes into a lobbying campaign—the research, the strategy planning, the phone calls, and visits—will help fulfill your goal, whether it be finding a cure for cancer, beautifying the local park, or some other cause that helps those around you.
9. **The views of PTAs are important.** Because local governments often decide how to spend federal and state money, local organizations have even more responsibility to tell local policy makers what is needed and what will work. Your lobbying can have an immediate, concrete effect on people in need.
10. **Lobbying advances your cause and builds public trust.** Building public trust is essential to nonprofit organizations, and lobbying helps you to gain it by increasing your organization’s visibility. While raising funds and recruiting volunteers are important to achieving your organization’s mission, lobbying is just as crucial.

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Steps to Effective PTA Advocacy

Determine the Issue

Issues need to be presented in a manner that makes sense to people, thoroughly addresses their concerns, and offers a clear solution that is worth the efforts made.

For example, if you are attempting to gather community support and funding for an after-school program, it is important to make the benefits apparent to all members of the community—including those residents without school age children.

In addition, there will be times when the PTA will not be raising an issue, but will be responding to one raised by an opposing group with different ideas. Recent examples include the “65 percent solution,” taxpayer bill of rights, tax cap initiative, and statewide private school voucher programs.

Whether you are supporting or opposing a public policy initiative, your task is the same. You must frame or define the issue in a way that appeals to your audience, whether they are members of your local school board, state lawmakers, members of Congress, or the voting public.

Check National PTA Positions and Resolutions

Any issue taken up by a local or state PTA cannot be in conflict with national PTA positions and resolutions.

Local board or committee approval may also be required before undertaking any PTA-sponsored or supported advocacy activity. PTA's can support or oppose existing or proposed policies when the state or the national PTA organization has no stated position on the issue. PTA's can also develop their own initiatives and advocate for them. It is important to attain consensus for action and gauge the level of support among local PTA members before engaging policy makers under the PTA banner.

Research the Issue

Framing or shaping an issue for PTA action requires continually remaining on top of the facts. Research includes gleaning data from PTA and other child advocacy organizations, reviewing minutes of public meetings, and acquiring copies of proposed rules, regulations, or laws. While the Internet has made research much easier, remember to check the source of the information to ensure that it is an accurate reflection of the facts. Brainstorm with other PTA members or representatives of allied groups who are knowledgeable about the issue. Here are some questions to consider:

History

- What is the importance of the issue to the national PTA organization?
- Does it fit within the organization's mission and goals?
- How will it impact the education and well-being of children?
- Will it result in concrete and quantifiable improvements?

Climate for Change

- Does the issue have clarity, and will it appeal to a broad range of people and their "kitchen table" concerns?
- Will it bring your members together without alienating outside individuals and organizations?
- Does it require multiple resources, both people and money, to make an impact persuading policy makers?
- Will the issue strengthen PTA by attracting new members or energizing current members to a greater level of support for causes that benefit children?

Factors Surrounding the Decision

- Who has the ultimate authority and responsibility for making the decision?
- Are there existing federal, state, or local laws, such as the No Child Left Behind Act, that set parameters within which the decision must be made?

Opposition

- Is there organized resistance to your cause?
- What is the size of their organization and of their bankroll?
- Do they have connections with the decision makers?
- Do they have the ability to attract media attention, such as public figures or celebrities for spokespeople?
- How determined are they to prevail on this issue?
- How do their arguments differ from PTA's position?
- Do these arguments resonate with the community or voters?

Build Your Volunteer Network

Turn Members into Advocates

The first step is to let members know how they can participate in the advocacy process by clearly communicating the local, state, and national PTA goals. Identify specific issues or concerns in which PTA could be involved at the local, state, or federal levels. Make issues and goals real to members by identifying how the issues touch their lives, the lives of their children, or the community at large.

Make it easy for members to find information on PTA advocacy efforts by devoting part of your PTA newsletter or e-mail communications to public policy information. Use your local and PTA websites to bring attention not only to current public policy issues, but to success stories of previous PTA efforts in the state or surrounding communities.

Build an e-mail address book to disseminate important information quickly and efficiently, particularly if you are actively engaged in a local, state, or federal public policy campaign. Participate in bulletin boards on PTA websites to share information, gather allies, and research successful strategies with other PTA members around the country.

Reach Out Beyond the PTA Circle

As a PTA unit, you cannot grow in size or power if you only “preach to the choir.” In order to increase clout with decision makers, a considerable investment must be made to extend beyond your current circle of influence.

The best place to start is by encouraging current active members to contact friends, neighbors, and colleagues to tell them about PTA projects and advocacy efforts. Further, approach people from other organizations with similar concerns and interests, and attend school-related and community events where a PTA presence would be welcome. PTA members can also recruit new supporters as they go door-to-door with petitions or flyers, as well as set up phone banks.

No matter where you are recruiting, you must keep your goal in mind.

- Are you seeking to convince people to take specific action, such as voting, calling their school administrators or lawmakers, signing a petition, or attending a local PTA meeting?
- Be prepared to explain the PTA mission and how our public policy issues affect the community. Listen to people’s concerns and show how PTA is helping to address them at the local, state, and national levels.
- Ask for an e-mail address, phone number, and other contact information so new contacts can be added to your “advocacy action list.”
- Assign someone to make reminder calls or send e-mails to reinforce your contact and the commitment to help PTA take action.
- Have a volunteer available to greet all new attendees at meetings.
- During meetings, thank all attendees for taking the first step to help all children.

Your Advocacy Network

Regular communication is essential to maintaining an advocacy network.

- Build on PTA's *This Week in Washington* e-newsletters by adding a local angle when you forward it to your local network members.
- Share news of successes and challenges by setting up local bulletin boards, listservs, or e-mail lists so that members can exchange information.
- Give as much advance notice as possible about informational, organizational, and action meetings, and schedule those meetings based on local norms for parent work hours and other school-related activities so that the maximum number of people can participate.

You may want to set up small working groups of three to five parents who can focus their attention on a specific, narrow issue or a specific aspect of a larger issue. The working groups can meet more frequently and then report back to the larger group with specific tasks that need to be assigned or a concrete plan for action. In this way, volunteers can devote their time and energies to an advocacy issue or action in which they have a particular interest or expertise. This will help maintain their interest in the advocacy effort as a whole.

Provide a Variety of Ways to Help

Not all PTA members will be able to devote a lot of time or resources. By offering a variety of duties, each volunteer can pick a task that fits his or her individual situation and time constraints. Offer donors, local businesses, and community members a variety of ways to help, too, such as paying for printing costs, donating extra office supplies, providing a centralized meeting space, or contributing raffle prizes. When you need help from a member or business leader, don't be afraid to ask.

You should always provide your volunteers with the tools they need to successfully complete their tasks. For example, if you are asking members to make telephone calls to their member of Congress, prepare a script or talking points ahead of time, give adequate background information on the issue, and provide them with a contact name and telephone number.

Once a member or business leader has offered to donate time or money, it is up to you to ensure the experience is a positive one. Involve the member in specific tasks that match his or her skills and interests. And, be certain to invite donors to events that show them how their money is being used.

Finally, in a volunteer organization like the PTA, the words "thank you" take on an even more powerful meaning. Thank your members, volunteers, and donors often and in public. Write a note and present a "certificate of appreciation" to let volunteers know they make a difference and their efforts are appreciated.

Organize Around Goals

In setting your goals, assess what you ultimately seek in the long term, what can be gained while you are still trying to bring about change, and what needs to be achieved right away.

Ask yourself these questions:

- What is the desired outcome of your actions and activities?
- What does the PTA want the community to demand from the decision makers?
- How will you measure your success and what will you deem a victory?
- Are there successive steps that can be identified and celebrated on your way to victory?
- Will the goals leave the PTA stronger and larger once they are achieved?

Short-Term Goals

These goals will lead you to achieve your intermediate goal and might include getting endorsements from the school principal, community leaders, or local or state officials. Other short-term goals could include producing a document showing the disparities between schools in the district and setting up tours for lawmakers or the media.

Intermediate Goals

These goals reflect victories that might be accomplished midway through your efforts and could ultimately lead to achieving your long-term goals. For example, you might work with a state legislator on a new plan to provide additional money for schools and districts. Because the legislative process is often slow, just getting a legislator to introduce a bill or have a legislative committee hold a hearing on an issue can be a significant achievement.

Long-Term Goals

Your long-term goals should reiterate the overall objectives of your efforts. For example, your long-term goal may be to overhaul the state school finance laws and replace them with laws that more equitably distribute funds among rich and poor districts. Part of your long-term goal might be to raise the base level funding of schools by the state and make this a statewide issue in the upcoming governor's race.

➔ Targeting

Once you have defined your issue and identified goals for your advocacy efforts, decide who can help you achieve your goals—who has the ability to make the changes that you want. These decision makers are the “targets” of your advocacy efforts. The first step is outlining the targets of your efforts and the tactics that will help you achieve your objectives.

Primary Targets

It's important that the decision makers are people such as school board members, principals, and lawmakers who have the power to deliver your goals. Most of your persuasion efforts should be focused on them. When planning, ask yourself:

- Who has the power to make your solution a reality? Is the issue something a principal can change or is it a district-wide policy?
- Personalize your target, making it a single individual as opposed to a whole group. This helps make your goal seem more attainable. It may seem much easier to influence your school principal, a city council member, or member of Congress than taking on the school district, city hall, or Washington.

- Whenever possible, focus your efforts on more than one target. This is especially important when you are trying to persuade lawmakers, because power is generally split amongst many branches of government, and to be effective and spark change, pressure must come from a variety of places.

Secondary Targets

This group is the prominent members of the community, such as business leaders, activists, clergy, community groups, civic organizations, and the members of the media who can help you influence your primary targets.

Ongoing Targets

Who are your most likely supporters among the public at large? These will be the people whom the PTA needs to inform or target for “Get Out the Vote” drives for ballot initiatives. Think in terms of counties, precincts, neighborhoods, school districts, and other ways to break up large targets into manageable segments.

State and Local Legislative Targets

Lobbying legislators is about persuading them to do what you believe is right. There are five main categories of legislators, each requiring its own special strategy:

1. **Champions**

Each issue needs a group of lawmakers dedicated to being tireless, committed advocates for the cause. They can make the case to their colleagues, help develop a strong “inside” strategy, and be visible public spokespeople. However, they need good information and visible support outside the Capitol, which is where you come in.

2. **Allies**

This group will be on your side and can be pushed to do more—to speak up in party caucuses or on the floor or to meet with undecided lawmakers on your behalf.

3. **Fence Sitters**

Some legislators will be uncommitted on the issues, open to being swayed to vote either way. These are your key targets; an effective lobbying strategy is creating the right mix of “inside” persuasion and “outside” pressure to sway them your way.

4. **Mellow Opponents**

Another group of legislators will vote against you, but are not inclined to be active on the issue. It is key to keep them from becoming more active, by lobbying just enough to give them pause about taking a more active role, but not too much to make them angry.

5. Hard-Core Opponents

Finally, there are those lawmakers who are leading your opposition. It is important to isolate them by highlighting the extremes of their positions, rhetoric, and alliances, and giving other lawmakers pause about joining with them.

Adapted with permission from the Connecticut Association of Nonprofits Advocacy/Lobbying Toolkit, available at www.ctnonprofits.org/pages/NonprofitResources/Advocacy_Lobbying_Toolkit.asp.

Tactics for Influencing Your Targets

Depending on the targets you select, there will be a number of ways to reach out to them. If the target is an elected politician, it is important to remember that PTA is a non-partisan organization and certain political activities are not allowed. While it is acceptable to draft, petition for, or endorse ballot initiatives when they fit within the strict parameters of PTA's national resolutions and position statements, state or local PTA units may not endorse or campaign on behalf of, or against, any candidate or political party.

One-on-One Persuasion Campaigns

These are aimed at your primary targets, the decision makers. PTA members are mobilized to make appeals on behalf of passage, or defeat, of a particular school policy or piece of local, state, or federal legislation or regulation. This can be done in person or by means of telephone calls, letters, faxes, or e-mails.

Media Campaigns

All media efforts are aimed at influencing decision makers and the public (more on these tactics can be found in the Developing an Appealing Message section).

Petition Drives

Aimed at either the general public or decision makers, petition drives have a two-pronged goal of educating the community and obtaining the signatures required to rescind or reinstate a policy, or place an issue before the electorate.

Public Education Campaigns

These campaigns are typically aimed at the public and should be included in any "Get Out the Vote" campaign efforts. Members of the local, state, or national PTA organization can circulate guides discussing issues ranging from vouchers and school privatizations to what parents should look for in a proposed charter school. These campaigns can also include hosting candidate forums or town hall meetings.

Voter Registration or "Get Out the Vote" Campaigns

First, check with your local and state government for the rules and restrictions regarding registration drives, which can often be conducted in conjunction with petition drives or PTA membership drives. "Get Out the Vote" campaign efforts include door-to-door or telephone canvassing, as well as helping people to the polls on election day.

Host a Candidate Forum or Town Hall Meeting

A candidate forum or town hall meeting will provide people in your community the opportunity to meet local public officials, school board representatives, and other decision makers. To conduct an effective town hall meeting, follow a few key steps:

1. *Create a Forum Planning Committee*

Include PTA officers and members, educators and school officials, business and community leaders, and anyone else who may hold a stake in the debate. Work with members in your community or other organizations that may have already scheduled a similar forum similar.

2. *Develop the Format/Logistics for the Event*

Who will be invited to attend? Will a large, blanket invitation be issued? Where will it be held? Will local businesses be asked to contribute resources? Your program should not run more than 1-1/2 hours and should allow time for questions from the audience.

3. *Publicize the Meeting*

Determine the most effective means to invite participants and attendees. This could include posters, announcements in community newspapers and newsletters, and radio ads. Be sure to begin publicizing the event right after the date, place, time, and speakers have been finalized.

a. **Contacting/inviting speakers and a moderator**

Select a respected community leader as a moderator, preferably someone who is an experienced speaker, unbiased in his or her opinions. Be sure to invite all points of view and be prepared to convey the PTA position clearly.

b. **Overseeing media events**

Contact the local print, television (including cable), and radio media outlets through phone calls and press releases.

c. **After the town hall meeting**

Send thank-you notes to panelists and submit a community interest piece to the local newspapers about what transpired. Provide pictures if possible.

Coalitions

Coalitions are formed when individuals and organizations with diverse interests join together to focus on specific, mutually-related goals, ranging from information sharing and coordination of services to community education and advocacy for major policy changes.

Advantages and Disadvantages of Coalitions

The greatest advantage of coalitions is the pooling of people and other resources, which often translates into more staff, volunteers, and money than an individual organization can provide. Coalitions also demonstrate to principals, school board officials, lawmakers, members of the community, the media, and other decision makers the broad public support for issues PTA members are concerned about.

While all these positive things can be said of coalitions, it is important to keep in mind that there are disadvantages as well. Building coalitions takes time and energy, and it can distract you from other important work, such as strengthening your own PTA organizations. Also, coalitions cannot represent all of the views of the member groups; they need to focus on a common issue or goal.

Organizational structures within a coalition can also slow down the decision-making process and response time within the coalition. Compromises will have to be made, and this may require groups concentrating on one or two common issues. This should not be a distraction as long as the coalition activities only address areas of common concern. It is important to not allow one organization making up the coalition to dominate the coalition's activities or policies.

Considerations for Joining/Building Coalitions

If your PTA is considering joining or building a coalition, it must first determine that the coalition's issue is consistent with PTA's national resolutions and position statements.

The next step is to acquire the approval of your PTA board or appropriate committee. Before proceeding, it is also important to determine the level of support among your members for the proposed coalition.

The issue you coalesce around will determine the type of coalition you build or join. To keep it simple, we broke them into three categories:

1. Informal Coalitions

An informal coalition consists of an on-going group with no formal structure. Groups share common interests and their primary purpose for meeting is to share information and strategize.

***Example:** At the local and state level, an informal coalition may be formed to monitor the implementation of new tests or standards for high school graduation. PTA members may join together with school administrators, school board members, and the local teacher union to monitor the progress, inform the community, and issue reports. Another example of an informal coalition is the National Coalition for Public Education (NCPE), which the national PTA organization chairs. This coalition is comprised of more than 50 education, civil rights, and religious organizations devoted to supporting public schools and opposing the funneling of public money to private and religious schools through such mechanisms as tuition tax credits and vouchers.*

2. Formal Coalitions

While all coalitions have defined missions with specific goals, formal coalitions have staff or leadership to carry out ongoing responsibilities. This type of coalition may be incorporated or governed according to bylaws.

***Example:** Most local PTAs may not have the opportunity to join or form formal coalitions, but the national PTA organization and many state PTAs are members of formal coalitions. The national PTA organization is a member of the Committee for Education Funding (CEF), which is a voluntary, nonprofit, and nonpartisan*

coalition with members ranging from educational associations, institutions, agencies, and organizations whose interests range from preschool to postgraduate education in both public and private school systems.

3. Ad Hoc Coalitions

These types of coalitions are short-term and are generally formed around a single issue.

Example: *At the local level, they could be formed around the goal of implementing PTA’s Standards for Parent Involvement. An Ad Hoc coalition with this goal could include the PTA, local law enforcement, and local businesses as members. At the state and national PTA levels, there tends to be a legislative or policy focus to the coalition.*

➔ Developing an Appealing Message

Message development and disciplined delivery is key to winning over decision makers. An effective message is targeted at the people who are undecided about the issue and should be crafted in a way that persuades members of the community to join with PTA.

Further, it should also persuade PTA members to become activists for children, the media to give weight to PTA positions, community members to demand change, voters to go to the polls, and decision makers to enact policies or vote on initiatives that are in line with PTA principles, as well as remind everyone of the importance of parent involvement in decision making.

To develop your message you must first research the issue, which you have already learned how to do. The next step is to place this information into a “message box.” The message may include what the opposition is saying about the issue, so by placing this information in a message box, you will be better able to craft responses that control the dialogue. You will need responses for the following:

➔ What PTA says about the issue	⦿ What opposition says about the issue
➔ What PTA says about opposition’s position	⦿ What opposition says about PTA’s position

Once the message has been crafted, it is vital to keep it consistent in all communication. In order to be heard, keep the message simple, repeating it over and over again. Remember, PTA members will be tired of the message long before it begins to even sink in with decision makers and the general public.

Using the Media

Media provides the best opportunity to reach the most people within your target audience at a given time. Therefore, the importance of planning and executing a media plan cannot be stressed enough. Media coverage does not happen without legwork. Those who work the hardest to attract, maintain, and control the attention of the press will, in the end, be the most visible to the public. To be effective:

- **Assess the Media Available in Your Community**
This will require researching all types of media outlets (newspapers, radio, television, etc.) in your area. Make a complete list of these outlets along with contact names, phone and fax numbers, and e-mail addresses.
- **Write a Media Plan**
A media plan should include ways to generate interest in your issue; educate policy makers, legislators, and the public; reveal alternative information to reporters; or force a decision maker or candidate to take a position. Your media strategy needs to be tailored to effectively reach the decision makers you are trying to influence. If you are reaching out to legislators and policy makers, you will want to aim your efforts toward the op-ed pages and editorial board meetings. If your goal is to reach the general public, morning news radio and press events will reach a broader audience.
- **Become a Reliable Source for Reporters**
As a PTA leader, you understand how children are affected by what happens in and out of school. You need to make this expertise available to reporters. Try to keep the relationships with the media friendly and honest, and do not be afraid to approach reporters with an issue or a story idea. Remember that they are doing their job by reporting your stories, so try to make it easier for them by maintaining open lines of communication. The best way to start this relationship is by calling and introducing yourself as the spokesperson for your PTA. Tell them you are available to answer any questions they may have and request that they call you for verification before they quote a PTA position.

Access to the Media Is Access to the Public

The story printed or broadcasted by the media can be shaped by the information you provide. Take advantage of breaking news on topics of interest to PTA by being a resource and a spokesperson. Let the media, and the community, know you are part of the larger picture, but also discuss the local impact of a national story. If a story is happening on the state or national level that has local impact, offer interviews, up-to-date information, and anything that can give a reporter a fresh angle.

There are a number of media outlets and strategies to consider when publicizing your story.

1. Daily and Weekly Newspapers

Daily newspapers cover national, state, and local education policy and initiatives, elementary and secondary school education, and other related topics from many angles—from profiles to school board meeting coverage. Weekly newspapers mainly report on stories of local interest.

When you increase your knowledge of the primary ways newspapers cover stories and make contacts with local reporters, you can contribute to stories and keep reporters informed about current PTA initiatives.

2. Pitch a News Story

By pitching news stories, you “sell” your story to reporters. This involves giving enough information to show the issue has a broad range of readers in the community. You should not call a reporter with a story idea unless you have something that is truly newsworthy. The most widely used way of pitching a story is to fax a press release or a media advisory to a newspaper with enough information to get reporters interested.

When calling reporters, keep their deadlines and timetables in mind. A daily paper usually has a 6:00 p.m. deadline and reporters are busy writing their articles between 3:00–5:00 p.m. Articles for weekly papers are usually wrapped up three days before publication.

3. Wire Services

Wire services, such as AP and Reuters, are news organizations that provide print and broadcast media with up-to-the-minute news. Wire stories are frequently picked up and run by smaller newspapers and broadcast outlets. The best way to get your information to wire services is by faxing or e-mailing press releases. Once again, be sure the information in the press release has wide-reaching interest before you proceed.

4. Press Conferences

If you have something exceptionally newsworthy, a press conference may be a good way to get broad coverage. The most important thing to remember is that reporters will not attend a press conference unless they feel you have actual news to deliver. Keep visuals and convenience in mind when choosing your location. You will have a better chance of having a television camera crew dispatched if the conference is conveniently located with available parking.

Schedule the Event

The best days to hold a press conference are Tuesday, Wednesday, and Thursday between 10:00 a.m. and 2:00 p.m. If it is later than 2:00 p.m., reporters may not be able to meet their deadlines.

Alert the Press

Alert reporters, via fax or e-mail, a few days ahead of time. Fax a copy of the media advisory to the daybook—a computerized calendar of media events in your media market maintained by the local newswire service (most likely Associated Press)—as well. Call key reporters the day before the press conference and ask if they have received your media advisory. Prepare press kits by including a press release summarizing the story, a list of all speakers along with their titles and brief biographies, and any other background pertaining to the story. Assign at least one person to greet the media with a sign-in sheet in order to keep track of who attended the event.

Prepare the Site and Your Speakers

Place a PTA banner or sign in front for the cameras. Prepare the speakers by asking them some of the tough, anticipated questions ahead of time, offering a written list of short, quotable answers (talking points) with which to respond.

Follow Up

After the press conference, call all reporters who attended the event and ask them if they have any questions or need more background information. Make phone calls and fax or e-mail press releases to those reporters who did not attend. If your PTA has a website, put the media advisory, press release, and contact information on the site, making it available to those who weren't able to attend.

5. Editorial Board Meetings

The Editorial Board of a media outlet determines and writes the papers' official positions on various issues. To arrange a meeting, submit a letter to the editor covering education issues. Be sure to include why the issue is timely and identify the local angle; then, follow-up your letter with a call requesting a meeting.

6. Op-Eds

Since most editors receive more op-eds than they could possibly print, it is best to first call the editor to see if there is an interest. When submitting the draft, include a cover letter stating any relevant credentials the author may have and PTA background information. Many newspapers now accept material via e-mail, which saves them the time of having to rewrite it from scratch. Keep the draft around 550–700 words; include the author's name, telephone number, and word count in the top left-hand corner. If you do not hear from the editor in a few days, follow up with a phone call. Remind him or her about the local interest and concern. If the op-ed is rejected, find out why so you can get published next time.

7. Letters to the Editor

This section of the paper is read by more people than any other section. Letters to the Editor can be used to clarify or correct facts misstated in an article or opinion piece; support or oppose official actions of the government, an agency, or special interest group; bring attention to a problem; create interest to encourage reporters or editors to write about a story not already being covered; or generate public support for your issue or cause.

Most papers limit Letters to the Editor to 250 words, so it is important to be brief, clear, and concise. Refer to the main newspaper article by name and date. Give enough background to convey the main points raised by the original story, assuming the reader has not seen it or does not remember it.

8. Television Coverage and Interviews

Television is driven primarily by ratings, so it is important to have realistic expectations about receiving coverage. Get to know the assignment editors in your area. When you call to suggest a story, make sure they understand the local angle and the importance of the issue to the community.

When preparing for television interviews, dress conservatively, but avoid black, gray, or pure white clothing, and anything with bold patterns. Wear something that will accommodate a clip-on microphone.

Be conscious of your hands and keep them by your side during the interview. Use simple words and phrases, and practice sentences that begin with, “The real story is,” or, “There are three things people need to know about this issue.”

Do not allow yourself to be drawn into speculation or a hypothetical line of questioning. Remember you are never completely “off the record.”

9. Radio

Radio has been an excellent way for PTAs to talk about issues throughout the nation, partly because radio has a much greater need for “news” than does television. Keep in mind your target audience and what they are most likely to listen to. Get to know the news directors at the radio stations broadcasting in your community, making yourself available as a resource for information on topics of concern to PTAs.

10. Internet

The Internet is an efficient way to disseminate a large amount of information to your members, strategic targets, and the media. A well-planned and -designed Web page adds credibility to your organization. Your local PTA can build a website and post information regularly about the issues and the effects your advocacy campaign is having. You can also incorporate reciprocal links to other allied organization’s sites and use the site to direct reporters for further background information on issues.

Communicating with Decision Makers

The more local, state, and national decision makers you persuade with your message, the better your chances are of achieving PTA priorities or keeping initiatives that PTA opposes from becoming law or policy.

The first step is establishing and maintaining an open dialogue within your own local PTA network. This means including an advocacy activity at every meeting and finding efficient ways to contact your advocacy volunteers, such as building an e-mail list or phone tree.

Once you develop a message that resonates, you will need to write up a fact sheet on the issue you've chosen and PTA's corresponding position. The fact sheet should include:

- The issue and background facts
- The PTA's position
- What you want to happen
- The number of PTA members you represent

Then, forward copies of all correspondence, preferably via e-mail, to the state PTA legislative chair and PTA's Office of Programs and Public Policy in Washington, DC.

Once you have developed your message and fact sheet, you are ready to build relationships leading to "one-on-one persuasion." If you have ever met with your school principal to talk about a school policy, spoken at your local school board hearing, called the governor's office, or written to your member of Congress, you have engaged in one-on-one persuasion.

Identify PTA members interested in engaging in one-on-one persuasion and encourage them to join the PTA Member-to-Member Network as well as your local and state networks. Keep their names, addresses, phone numbers, and e-mail addresses handy in a notebook or database.

Three Main Methods of One-on-One Persuasion

1. Direct Communication

The first step is to schedule an appointment with the decision maker. If you are trying to communicate with a principal or school board member you can usually talk directly with him or her. It is often more difficult to arrange a one-on-one meeting with a state or federal lawmaker, so ask for the staff member handling your issue to arrange a meeting. If you are scheduling an appointment with your U.S. or state legislators, you can usually meet with the staff member in the local, district office near your home. Often a contact in a district or state office provides a better opportunity for communication.

Draft an Agenda for the Meeting

Compile a list of the issues you want to discuss. If others will be attending the meeting with you, assign a specific issue or point for each person, limiting yourself to no more than three issues per meeting.

Arrive Prepared and On Time

Have your group meet in the hallway and then go in together. Once in the meeting, immediately identify yourselves as PTA members, and be prepared to identify the PTA position and to discuss any arguments the opposition is making. If you do not have the answer to a question, say so. Politely explain you will need to do further research and follow up at a later time.

Get a Commitment or Schedule a Follow-Up

Before you leave, ask the decision maker when he or she expects to make a decision or if one has already been made. If he or she is unable to give you a commitment, ask when you should follow up. Leave behind a fact sheet highlighting the issues and your contact information, offering yourself as a resource.

Communicate on a Regular Basis

A solid relationship with decision makers, or their staff, will build your credibility and clout. When you see the decision maker out in the community, be sure to greet and remind him or her that you are one of the PTA leaders with whom he or she met to discuss your issue.

2. Offer to Speak Publicly or Provide Testimony

Testifying before a committee of lawmakers or policy makers is an excellent means to explain what you want to do and what new information or perspective you will bring to the issue. Procedures for submitting testimony vary, but generally it is written and submitted in advance. When preparing your written testimony, be sure to include the history of the issue for PTA as well as your position and how it affects the local community. If you are testifying in person, identify your three key points in your statement, your rationale, and your recommendations for action.

3. Letters, Faxes, E-mail, and Phone Calls

Letters, faxes, or e-mails help to inform your policy makers, as well as alert and educate PTA members on the issues. On the federal level, the delays caused by security concerns have made e-mail and faxes the preferred method of communicating with your member of Congress. For effective communications, follow these steps:

Identify the Coordinator

Before you begin the letter writing campaign, select a person to coordinate your efforts—someone who has a good working knowledge of PTA national resolutions and positions. This person needs to develop regular communications with the legislative chair and become part of the PTA Member-to-Member Network to receive PTA Action Alerts on the course and content of legislation before Congress. Information contained in the Action Alerts often includes sample talking points and ways PTA members can contact their national lawmakers before they take action on pending legislation.

Make It Easy for Advocates to Participate

The coordinator should make it as easy as possible for the maximum number of people to participate. This may mean posting the information on your website, forwarding the Action Alert via fax or e-mail, and handing out information at the next PTA meeting. You may also need to telephone certain members who are not connected to the Internet.

Establish an E-mail List or Telephone Tree

To be successful at one-on-one persuasion, it is important to contact the maximum number of advocacy volunteers in the least amount of time. While faxes and e-mail alerts are the most efficient, don't forget those members without access to this technology.

- **Establish a telephone tree** by formulating a plan for calling those without access to the Internet or fax machines.
- **Divide the names of people to be called** among reliable people who will follow through on requests.
- **No one should make more than five calls**, and you should update the telephone tree list frequently since more and more people are signing up for e-mail every month.

Contact Your Legislator

You can find the contact information for your members of Congress at <http://capwiz/npta2/home>. Then use the following tips to lobby by phone and to write to your elected officials.

Effective Lobbying by Phone

- **Understand that you may be speaking to an aide, not the legislator.** The legislator's aides are key people with whom you will be dealing most of the time. Write down the name, since you will need it for follow-up conversations.
- **Be clear about what you want from this phone call.** You are calling simply to register your informed opinion on a pending issue. You are successful if the lawmaker's office understands that a concerned citizen has weighed in with a strongly-held opinion.
- **Introduce yourself and give your address, making clear you are a constituent.** If you have any special credentials, state them. Just the fact that you're associated with a PTA is a credential, but you may have other qualifications to support your opinion.
- **Say why you are calling.** Assuming you are calling about pending legislation, state the bill number and explain what the bill does. Don't expect the lawmaker to have every bill memorized. Get right to the bottom line. You are calling to urge a yea or nay vote.
- **Pause briefly for a reply but be prepared to continue without feedback.** The legislator or aide is likely taking notes and may want to hear you out before commenting.

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Writing to Your Elected Officials

Many legislators believe that a letter represents not only the position of the writer but also many other constituents who did not take the time to write. While many elected officials do not read letters personally, their staff members will read them, draft responses, and inform them about your concerns.

These tips will help increase the effectiveness of your letter:

- **Keep it brief.** Letters should never be longer than one page and should be limited to one issue. Legislative aides read many letters on many issues in a day, so your letter should be as concise as possible.
- **Get to the point.** Start with who you are and what you want up front. In the first paragraph, tell your legislators that you are a constituent and identify the issue about which you are writing. If your letter pertains to a specific piece of legislation, identify it by its bill number (e.g. H.R. ____ or S. _____).
- **Hit your three most important points.** Choose the three strongest points that will be most effective in persuading legislators to support your position. Be prepared to explain or clarify the points you are making.
- **Personalize your letter.** Tell your elected official why this legislation matters in his or her community or state. If you have one, include a personal story that shows how this issue affects you and your family. A constituent's personal stories can be very persuasive.
- **Personalize your relationship.** Have you ever voted for this elected official? Have you ever contributed time or money to his or her campaign? Are you familiar with him or her through any business or personal relationship? If so, tell your elected official or the staff person. The closer your legislator feels to you, the more powerful your argument is likely to be.
- **Remember, you are the expert.** Your legislator's job is to represent you. You should be courteous and to the point, but don't be afraid to take a firm position. Often, your elected official may know no more about a given issue than you do.

➔ Tips for Working with Lawmakers

Working with state and federal legislators often requires special attention to details and protocol. These policy makers are bombarded everyday with demands, requests, and “friendly” suggestions. With so much information coming at them from so many different viewpoints, it is often difficult for them to focus specifically on the issues of concern to you. Here are some helpful suggestions to increase your visibility and make the most of your contact with state and federal elected officials.

Six Practical Tips on Lobbying Your Legislator or Elected Official

1. Establish your agenda and goals.

- Know the subject you are going to address. Don’t overload with issues—stick to no more than two or three.
- Decide what you would like to get out of the visit, i.e., a commitment to vote for your issue, leadership on the issue, or a simple, informative discussion.
- Allow time for small talk at the outset, but not too much. Remember, it’s your visit.
- If it is a group visit, decide who will start the discussion and put your agenda on the table.

2. Listen well.

- Much of lobbying is listening, looking for indications of the elected official’s views, and finding opportunities to provide good information.
- If you are meeting with a “silent type,” draw him or her out by asking questions.
- If you are confronted with a “long-winded type,” look for openings to bring him or her back to the point.

3. Be prepared, but don’t feel that you need to be an expert.

- Many elected officials are generalists, like most of us. Do your homework, but don’t feel that you need to know every little detail of an issue. Air personal feelings and experiences where appropriate. Relate the concerns of your friends and members of the community.
- Know when to admit, “I don’t know,” and offer to follow up with the information.
- Be open to counter-arguments, but don’t get stuck on them; don’t be argumentative or confrontational.

4. Don’t stay too long.

- Try to get closure on your issue. If you and the legislator are in agreement, express your thanks and leave. If you reach an impasse, thank him or her, even if disappointed. Leave room to continue the discussion at another time.

5. Remember you are there to build a relationship.

- If the elected official keeps a commitment on an issue in which you’ve been involved or has supported your position in the past, be sure to acknowledge your appreciation during the course of the visit.
- If the opposite is true, think of the phrase, “No permanent friends, no permanent enemies.” Some day, on some issue of importance to you, he or she may

come through. In the meantime, your visit may prevent the official from being an active opponent. In other words, you may help to turn down the heat on the other side.

6. Follow-up is important.

- Be sure to send a thank-you note after the visit. If commitments were made in the meeting, repeat your understanding of them. If staff members were present, write to them, too. They can often be important allies.

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Do's and Don'ts of Lobbying at a Glance		
Action	Do	Don't
Phone	<ul style="list-style-type: none"> • Offer to call back at a more convenient time. • Use your time well. 	<ul style="list-style-type: none"> • Talk more than 10 minutes. • Talk at dinner.
In Person	<ul style="list-style-type: none"> • Speak only briefly about your issue at an unrelated function. • Offer to make an appointment. • Remember—door-to-door is not good for detailed discussions. 	<ul style="list-style-type: none"> • Think your issue is the only issue. • Insult. • Push when you don't have their undivided attention.
Mail	<ul style="list-style-type: none"> • Send a letter. • Get three letters from friends. 	<ul style="list-style-type: none"> • Send a postcard. • Send a form letter. • Send a petition.
Making Your Case		
Do	Don't	
<ul style="list-style-type: none"> • Smile and be gracious. 	<ul style="list-style-type: none"> • Threaten or be impolite. 	
<ul style="list-style-type: none"> • Relate it to you and others on a personal level. 	<ul style="list-style-type: none"> • Monopolize the conversation. 	
<ul style="list-style-type: none"> • Appreciate their time. 	<ul style="list-style-type: none"> • Tell them they owe you the time. 	
<ul style="list-style-type: none"> • Understand what time of year it is. 	<ul style="list-style-type: none"> • Ask them to sponsor a bill on June 1. 	
Driving Your Message Home		
Do	Don't	
<ul style="list-style-type: none"> • Offer to get back. Follow up with a thank you. 	<ul style="list-style-type: none"> • Forget to follow up. 	
<ul style="list-style-type: none"> • Give them a reason to get back to you. 	<ul style="list-style-type: none"> • Expect them to remember you and your issue without prompting. 	
<ul style="list-style-type: none"> • Make a note to yourself about the date and discussion. 	<ul style="list-style-type: none"> • Expect too much or too little. 	
<ul style="list-style-type: none"> • Try again if there are no communications after three months. 		

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➔ Putting It All Together

Create a written plan in which you identify PTA goals, organizational capacity, target audiences, potential allies, opposition, and the activities to be pursued. Filling out a strategy chart is a useful way to collect the necessary information in one place (a sample strategy chart is provided as a part of this toolkit).

Once your advocacy effort is complete, evaluate your success by asking the following questions:

- Is our PTA a more powerful and better-trained advocacy network?
- What has been successful and what would we do differently?
- Have we built membership with our efforts or generated positive publicity for our PTA?

➔ PTA Resources

There are a number of resources available for PTA leaders and members from the national PTA organization.

Resolutions and Positions

A complete book of current and retired resolutions is available in state PTA offices or through the state PTA president. These provide the authority for any advocacy position you may take.

The PTA Legislative Program

Resolutions and position statements provide the authority for any action by the PTA on federal legislation or regulations affecting the health, education, and general welfare of children and youth. The Legislative Program reflects the federal legislative priorities of the PTA.

PTA Website—www.pta.org

The PTA website is regularly updated with information about bills pending before Congress, PTA programs, press releases, and background briefs and talking points on each of the issues identified as national priorities, as well as Action Alerts and the weekly newsletter from Washington, *This Week in Washington*.



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