Tobacco Prevention Campaign Advocacy Playbook

Introduction
Congratulations! Your PTA has made an important commitment to provide tobacco prevention education and advocacy to your school community.

Whether you are deepening the work you have already started or just beginning to implement your plans, this playbook is a helpful guide as you grow confidence in raising your voice to make a difference. National PTA will be here to support you every step of the way. Use the resources we’ve provided to create a meaningful campaign around youth tobacco prevention and e-cigarette use, including prohibiting flavored tobacco products.

This playbook will help you launch a sustainable, long-term substance use prevention education and advocacy campaign in your community—including the tools you need to demystify and debunk myths related to e-cigarettes and flavored tobacco products.

The pages in this playbook will guide you through the design of your efforts, the implementation of a solid education program, and the follow-through necessary to build a strong advocacy campaign. However, it’s important to note that you and your PTA know best what your school community’s needs are and how to solve them.

As a PTA, you are not expected to be an expert on the issues—rather, your PTA is a trusted convener. You can always rely on partners, like Campaign for Tobacco-Free Kids (TFK), to provide the meaningful content and let your PTA focus on convening families and sharing the content and appropriate resources to teens and adult caregivers.

Terms to Know: Advocacy
In the context of PTA, advocacy means supporting and speaking up for children—in schools, in communities and before government bodies and other organizations that make decisions that affect them.

Terms to Know: Adult Caregiver
Adult Caregiver refers to any adult figure in a student’s life (parent, grandparent, foster parent, aunt/uncle, mentor, etc.)
The most successful way to use this playbook is to start at the beginning and walk through all steps—in the order listed in the Table of Contents—using the worksheets and resources mentioned in each step. Use the Table of Contents as a checklist, completing each step in the order they are listed. All worksheets and resources are linked within the playbook and can also be found in the appendix. You can review this “how-to” video to get started: Tobacco Prevention Campaign Playbook “how-to” video!

Table of Contents

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Step 1: Get Clear
The first step is to get crystal clear on what you want to accomplish through your prevention education programs and advocacy work around tobacco prevention. If you focus on what matters most to your school community—and use the unique strengths and opportunities within your community—you will maximize your success.

In this first step, you will answer the questions below to clearly articulate your goals and to help you communicate your goal confidently to others. The following pages will walk you through each consideration.

- **Listen to your community!** Ask your families, students, educators, administrators, etc., what topics matter most to them. Consider:
  - What is your community most concerned about and what are their suggestions for addressing the concerns?

- **Examine all possible areas of influence!** Think about what factors your PTA has the most influence on to create an impactful change. Consider:
  - What do we have the most influence to change?
  - What will have the greatest impact?
  - What skills, relationships and assets do we have available?

- **Find your sweet spot!** Ask your PTA, “How should we go about doing the work to best accomplish our goals?” Consider:
  - What steps should we take, when should we take them and who should we partner with to ensure success?
  - Who is the intended audience?

- **Clearly define your goal!** Ask who, what, when, where—and then share. Consider:
  - What, precisely, do we hope to accomplish?
  - When do we hope to accomplish it?
  - How do we communicate our goals to our school community in a meaningful, consistent and effective way?

**Listen to Your Community**
Work with your PTA leadership team to decide what information you need from your community before you can begin your tobacco prevention work. Then consider how best to gather this information to get the full scope of their concerns and possible solutions.

Make sure to record what you learn. We suggest sending out a survey—see Appendix 1 for a sample survey invitation letter.
When gathering input from the community, be sure to do it in a way that is accessible and inclusive for your entire community. Take active steps to reach all families, including those who may not have reliable internet access, those with disabilities and those who may not be fluent in English.

Explore National PTA’s Center for Family Engagement webpage for helpful tips and strategies, as well as the Resources Sheet in Appendix 2 for additional resources to support your diversity, equity and inclusion efforts. Here are some suggestions to ensure you’re representing every child.

- **Get the lay of the land from your students and families.**
  - Send out a survey to students and/or adult caregivers to determine the specific needs, concerns and perspectives of your community around youth tobacco prevention.
  - Ask your school community what matters most to them and what challenges they are facing.
  - Don’t forget to ask what solutions they suggest to answer their challenges. Getting buy-in early from fellow parents and families is important for outcome success.
  - See sample survey language in the Survey Sample Resource (Appendix 1).

- **Remember to be inclusive of all families.**
  - Ask your school administrators to help you engage ALL families. They may have tips or insights on the best way to contact certain demographics.
  - Host focus groups or listening session. Conversations might be more accessible for some families than a survey. Either virtually or in person (please follow CDC guidelines and state ordinances/restrictions) arrange a time to meet with students, adult caregivers and other community members.
  - During your meeting, make sure to actively listen and really hear what your community is telling you. What challenges are they experiencing? What pressures do they feel? Ask directly what solutions might be most beneficial to them.

- **Review relevant academic and health data.**
  - Dig into your school’s academic data and your community’s health data. Work with your school administrators to determine what would be most useful in informing your campaign. You might be surprised at what you find.
  - Explore the Youth Risk Behavior Survey and National Youth Tobacco Survey data for research-backed ways to determine teen risk behaviors.

**Examine All Possible Areas of Influence**

National PTA has been supporting communities and shaping public policy by leveraging the parent and educator voice for over 125 years. That century-plus-long track record of creating change means that every PTA—every single unit in all of our 54 State Congresses—have influence, whether the change needs to happen at a school board meeting or on Capitol Hill in Washington, DC.
More importantly, for this project, it’s important to remember that PTAs are an influential voice within their communities. Families trust you and decision-makers listen to you. To wield your powerful influence most effectively, it’s key to sit down as a PTA and ask yourselves: “What do we want to do, and who do we want to do it to?”

Here are steps to help you determine where you might have the most influence to create positive change. Remember, you’re only human, so set yourself up for success by maximizing your time and energy with a clear understanding of where your efforts should be focused. This section will help you do that!

- **Use the Socio-Ecological Model of Health.**
  - This model sees health as a collection of factors, which encompass physical, mental and social well-being.
    - Specifically, the socio-economic model considers how health is affected by interactions between the individual, the group/community they belong to, and the physical, social and political environments around them.
  - By thinking through this lens, your PTA will be empowered to explore all the possible ways you can create change by influencing others, changing environments, and forming meaningful partnerships around tobacco prevention education and advocacy.
    - Get started by using Worksheet A—Socio-Ecological Model in Appendix 1.

- **Tap into the PTA network.**
  - The best part of being a PTA is that you never have to do it alone. Someone always knows somebody who can help!
    - Do your PTA members have relationships with decision-makers on this issue? Would that member be willing to schedule a meeting for the decision-maker to meet with your PTA?
    - Are other local PTAs doing similar work? If so, can you partner with them, learn from them, or share resources with them?
    - Connect with your district PTA to see if they are involved in the work you’re doing, or if they might like to get involved.
    - Check with your state PTA. What resources do they have and are they interested in working with you?
  - Ready to get started? Use Worksheet B—PTA Network to see which relationships you should leverage to meet your goals.

*Find Your Sweet Spot*

After listening to your community, using the Socio-Ecological Model Worksheet and the PTA Network Worksheet, you should have a lot of possible ideas for your prevention education and/or advocacy work.
The next task is to get clear on what your PTA can uniquely do to make the most difference in YOUR school community. To find your “sweet spot,” we encourage you to use a Changeability and Impact Matrix to determine where you have the most opportunity—see Appendix 1 for detailed instructions.

Essentially you will be organizing the data from Worksheets A and B to create a clear path forward. You’ll delete duplicate ideas and find overarching themes within the data and survey results. Then, your PTA leadership and school administrators will assign a value to each theme, from most to least impactful and from most to least difficult to change.

At that point, you’ll chart the rankings to discover your “sweet spot.” The results will help your PTA identify the ideas with the most potential to enhance and/or create a meaningful prevention education and/or advocacy efforts around tobacco prevention and e-cigarette use, including prohibiting flavored tobacco products.

Ready to get started? Go to Worksheet C—Changeability Matrix.

**Clearly Define Your Goal**

Now that you’ve found your “sweet spot,” it’s time to focus your efforts with an overarching goal. Clearly articulate what your PTA considers the problem to address, how your PTA plans to address that problem, who your efforts will target, and what your desired outcome will look like.

Your final goal should include the answer to all the following questions:

- What can our PTA do that will make the most difference to our school community? How should we go about the work to best accomplish our goals?
- What steps should we take to ensure success? Who is the intended audience of our efforts?
- What are my PTA’s unique strengths and assets that will help us to do this work effectively? What will make this work more challenging and how can we minimize those challenges?
- When do you hope to accomplish specific steps towards your goal?

Ready to create your goal statement? See Worksheet D—PTA Goal Statement and Action Plan. For now, focus specifically on Sections A-D.

**Step 2: Get Educated, Stay Informed and Prepare to Educate**

Now that you have a good idea of what you want to do, learn everything you can about the topic. Think intentionally about what you need to know to better reach your desired outcome.

In this step, you will answer the questions bolded below to understand the issue and share what you’ve learned with your community:

- Learn About Tobacco Prevention Education and Advocacy!
  - What resources have already been created that you can use and build upon?
o Has your local school board produced recommendations on this issue?

o Are there talking points and fact sheets from well-known and respected sources, like the Campaign for Tobacco-Free Kids, American Lung Association, American Academy of Pediatrics, and/or Center for Disease Control?

• **Consider Ways to Stay Informed!**
  o Research is always emerging on this issue, and as an advocate, it’s important to stay in the loop to maximize your impact. Consider following the organizations mentioned above on social media as a low-effort way to get the news.
  o You can also sign up to receive National PTA Advocacy Alerts through our PTA Takes Action Network! These alerts allow you to customize a pre-written letter and send it to your members of Congress.

• **Prepare to Educate!**
  o What channels of communication can your PTA use to educate families in your community on this issue in a way that is accessible and inclusive?
  o Who are the local government officials and other key decision-makers on this issue in your community? How can you best educate them on this issue?
  o What resources do you need to educate those you wish to influence?

Remember, there is no need to reinvent the wheel! Use the following pages to get started.

**Learn About Tobacco Prevention Education and Advocacy**

Good news! There are many reputable resources on the topic of tobacco prevention available for you to use in your prevention education and advocacy work. We particularly recommend that you check out the Resources Sheet in Appendix 2 as you work to complete Step 2.

To help you get started:

1. **Review the materials** located in the Resource Sheet document in Appendix 2. These include:
   a. Talking points
   b. Fact sheets
   c. Youth data

2. **See what other PTAs have done on this issue.**
   a. New York PTA
      i. Ban the Sale of Flavored E-cigarettes, Flavored E-liquids and Flavored Tobacco
   b. Texas PTA
      i. Vaping (and Tobacco) Flavor Ban, Regulation and Taxation
   c. California PTA
      i. Support for Measures that Prohibit the Sale, Marketing and Distribution of Flavored Tobacco and E-cigarettes
d. **Jeffco PTA**

   i. **Vaping Help and Information**

As your journey continues, be sure to add new resources, tools and contacts to the Resource Sheet to keep an updated reference list.

**Consider Ways to Stay Informed**

Sign up for advocacy alerts from respected organizations so you’ll know when something important happens. Don’t underestimate the power of connecting with your elected officials at critical moments, especially when it comes to tobacco prevention and other youth issues.

1. Explore [The Truth Initiative](#) to sign petitions, send pre-written social media messages to members of Congress, host awareness events, and more.

2. Sign up with [the National PTA Takes Action Network](#) to join millions of other PTA members in demanding change by sending letters to your members of Congress.

3. Visit [your state PTA’s website](#) to see if they have any alerts and sign up!
Prepare to Educate

1. **Find Out Who Represents You.**
   Make note of which key decision-makers you’ll need to work with to reach your goal. For example:
   a. If your goal is to change something at your local high school, you may want to focus your efforts on influencing your school’s administration or your district’s school board.
   b. If your goal is to eliminate flavors in all tobacco products, you may want to focus your efforts on your federal representatives.
   c. Use this chart to determine what level of government you’ll need to speak with and make your appeal.
      i. School Level
         1. Principal and other school administrators
      ii. District/County Level
         1. County commissioners
         2. School board members
      iii. State Level
         1. Elected state officials (e.g., Governor, Lt. Governor, Attorney General, State Senators, State Legislators, etc.)
      iv. Federal Level
         1. Elected federal officials (e.g., President, Vice President, U.S. Senators, U.S. Representatives, etc.)

2. **Gather the necessary resources to share with others.**
   What exists that you can use? What needs to be created? Use as many existing resources as possible. This is where partnerships really help. Update the Resources Sheet in Appendix 2 with any new tools you find along the way, but we’ve listed a few here to get you started.
   a. Position Statements
      i. National PTA – Dangers of Tobacco Products
   b. Resolutions
      i. National PTA – Resolution on Electronic Cigarettes and Electronic Nicotine Delivery Systems (ENDS) and Youth
   c. Talking Points, Fact Sheets and Key Messaging
      i. PTA Leaders
         1. Risks of e-cigarettes from the CDC
         2. How Schools Can Help Students Stay Tobacco-Free (printable)
         3. Take Down Tobacco – Join the Movement
      ii. Students
         1. TFK - Youth Initiatives
         2. Become a Smoke Free Teen
      iii. Adult Caregivers
1. Talk to Your Teens About E-cigarettes: A Tip Sheet for Parents from the CDC (printable)
2. E-cigarettes and Vaping: What Parents Need to Know from the American Academy of Pediatrics (printable)
3. What Parents Should Know from the American Lung Association

iv. Key Messaging
1. The Impacts of E-cigarettes on the Lung (printable)
2. How We Got Here (printable)
3. Youth Vaping: Still an Epidemic

In addition to the items listed above, we recommend the Campaign for Tobacco-Free Kids Resource Finder as another great tool to help you find resources on tobacco prevention education and/or advocacy.

Step 3: Engage Others
We are stronger together. Some partnerships will stand side-by-side with you as you work to accomplish similar goals, while others will do work that falls in a different category that still supports the overall effort.

Remember, as we advocate and educate using the Socio-Ecological Model of Health, we need to push for change at all levels to make the greatest impact. Step 3 will help you identify your possible partners. Use Worksheet E—Identify Partners, found in Appendix 1, to complete this step.

Identify Partners
Review the work you did in Step 1 and Step 2. Who is working on tobacco prevention and advocacy at the different levels? Who can you partner with, build a coalition with or simply be allies with?

- Make a list of possible partners, how they can help and what next steps you need to take to work together. Remember, Campaign for Tobacco-Free Kids is a partner with National PTA and has many resources available to you.
- Who else in your community can provide support to your PTA? What other organizations, government bodies, businesses, community groups or individuals might share your interest in this issue? As you think of possible partners, be sure to add their details and your notes into Worksheet D—PTA Goal Statement and Action Plan, which can be found in Appendix 1.

Step 4: Take Action
Prepare for success! Get clear on the actions you will take, who is responsible for each action, and the timing for each action to ensure your PTA meets your goals. Go back to Worksheet D—PTA Goal Statement and Action Plan, found in Appendix 1, and use Sections D and E to complete your Action Plan.
There are many ways you can take action around the issue of tobacco prevention. Use the following tips to guide you in your planning.

1. **Decide on the Ask**
   a. The most effective ask is one that is targeted to the right people and asks them to make a change that is within their power to make.
   b. Who has the power to change what you are seeking to change?
   c. What do they have the power to change?

2. **Decide on the Message**
   a. An effective message considers the audience and the issue.
   b. Think about:
      i. Why should the decision makers be interested in this issue?
      ii. Can you bring in compelling personal stories to make your case?
      iii. Can you bring in data to make your case?
   c. Do the background research on key decision-makers to understand what they might care about and craft your message in a way that appeals to them.

3. **Decide on the Action**
   a. Advocate for decision-makers to do something specific
   b. Take decision-makers to school
   c. Hold a Legislative Conference
   d. Hold a Forum: Bring parents, students and decision-makers together
   e. Launch an email or social media campaign
   f. Write a Letter to the Editor or simply reach out to your local newspaper
   g. Place an ad in your local newspaper or on your local radio stations
   h. Organize meetings to educate your decision-maker
   i. Inform students/teens, adult caregivers, and other members of your community about the importance of tobacco prevention
   j. Host Family (i.e., teens and adult caregivers) education sessions
      i. Include a Teen Pledge
      ii. Include an Adult Caregiver Pledge

4. **Be Prepared to Make an Impact: Generate Campaign Noise**
   a. Announce your tobacco prevention and advocacy initiative (we encourage you to use the provided templates)
      i. Customizable Media Advisory Template
      ii. Customizable Press Release
      iii. Sample Social Media Messaging

5. **Host an Event**
   a. When implementing a Tobacco Prevention Campaign, you are encouraged to host a Family Education Session to inform students and adult caregivers about your tobacco prevention and advocacy efforts and to provide a space for open, honest family conversations.
b. All of the materials you’ll need to successfully host an event are listed here and are provided in Appendix 2. Your Family Education Session can be held in-person or virtually, whichever option suits your community’s needs and follows CDC guidelines and state ordinances.
   i. Resources Sheet
   ii. Pledges
      1. Students/Teens
      2. Adult Caregivers
   iii. PowerPoint Presentation Slides & Information
   iv. Sample Budget
   v. Media Release Form
   vi. Customizable Media Advisory Template

c. Don’t forget to have your attendees sign a Media Release Form. You’ll want to take lots of photos during your event and share them afterwards to keep the buzz about your tobacco prevention education and advocacy efforts going!

**Step 5: Keep Up the Good Work**
As your efforts start to gain traction, remember that advocacy is all about the long game. School and government policies are slow to change, and seeing results takes time!

The most effective advocates are the ones who know that the work is ongoing. Even when we accomplish the current goal, there is always more that needs to be done to ensure a safe and healthy environment exists for all children. Let’s celebrate our accomplishments and keep up the good work so, as our PTA Mission Statement says, every child can reach their full potential.

Once you’ve completed Step 4, take some time to reflect on your campaign. Were you successful in accomplishing your goal? Is there more you can do? How can you ensure that your successes are sustainable? Let’s tackle a few of the big questions.

- **What Should You Do When You Don’t Get What You Asked For? What’s Next?**
  o Go back to Worksheet D—PTA Goal Statement and Action Plan, and figure out how, exactly, you got off course. Give yourself grace while also reflecting honestly on your efforts. Why didn’t you accomplish your goal? Do you need to change what you are doing or asking? Is more time needed?

- **What Should You Do When You DO Get What You Asked For? What’s Next?**
  o Go back to Worksheet D—PTA Goal Statement and Action Plan and decide how you can best build on your success. Get together as a group and discuss. What should you do and/or ask for now? Can you partner with another group working on this issue in another way? Can you develop a new goal? Or are you ready to tackle another issue all together?

- **Update Your Action Plan with Next Steps**
Regardless of the outcome, update your Action Plan regularly. Keep the work moving forward!

- **Pass It On**
  - Don’t forget that new decision makers come on the scene often. Keep everyone current on your issue/topic. Consider adding steps in your Action Plan for the below.
    - Inform New PTA Leadership
    - Outreach to Incoming Administration
    - Schedule Appointments with Newly Elected Officials
Appendix 1: Advocacy Worksheets and Resources

Survey Letter Example

The following is a sample message to send to students and adult caregivers, asking them for their thoughts and feelings about tobacco prevention education and advocacy work. It should be sent to students and adult caregivers, but it will need to be edited slightly to effectively reach both audiences.

Sample Message to Send to Students and Adult Caregivers Requesting Feedback

Dear [Insert School Name] Community,

We are excited to share that we have received a grant from National PTA, made possible by Campaign for Tobacco-Free Kids! The funds will be used to create an education program and/or advocacy campaign around tobacco prevention and e-cigarette use, including prohibiting flavored tobacco products.

Help shape our efforts! We need your input to be successful. Tell us—what do you think are the most important issues for us to address on this topic? Please take a moment to answer our survey questions: [Embed link to survey]. Keep in mind that this grant is meant to serve our school community during the [insert year] school year [Remove this sentence if it is not relevant to your PTA].

With your thoughts and feedback, we know that the meaningful tobacco prevention education and/or advocacy campaign work we will accomplish together over the next few months will create lasting change for our students, families and the community at large.

Thank you for your support as our PTA works to ensure every child reaches their potential. If you’re interested in directly supporting our efforts, we invite you to become a member! Simply [Enter steps to become a member of your PTA]. Remember, you don’t have to volunteer to join PTA—your membership is more than enough.

We look forward to hearing from you!

Thank you,

[Insert Name]
PTA Leader
[Insert Contact Info]
Worksheet A—The Socio-Ecological Model of Health


Specifically, the model understands that health includes physical, mental and social well-being. More importantly for our efforts around tobacco and e-cigarette use prevention, the model states that these three factors are heavily affected by the interaction between the individual, the groups/communities that individual belongs to, and the physical, social and political environments the individual moves through during their lifetime.

Examine the image on the right side of this page. Begin to see the many ways we can make a difference. To create meaningful and lasting change, we must first understand that the issue must be addressed at all levels. But don’t worry—this isn’t a reason to be overwhelmed!

The PTA network is perfectly structured to tackle issues at all levels. As a PTA, you should narrow your focus and concentrate your direct efforts in the area that will allow you to make the biggest impact. To make change at the other levels, you can, at the same time, partner with other leaders and organizations who are also addressing the issue.

Let’s get started! Use this worksheet to accomplish two tasks.
1. Explore the many opportunities available to your PTA to create change.
2. Explore the many potential partners who may also be doing this work.

Your Turn: How to Complete the Table Below
1. Examine the columns labeled “Levels of Influence” and “Description.” Add ideas.
2. Next, look at the column labeled “Examples.” What else can be done? Add ideas.
3. Consider who might already be doing this work. Add potential partners to the column labeled “Who is Doing This,” such as:
   a. Other PTAs
   b. Local non-profits
   c. Local, district or state coalitions
4. Once you’ve filled out all of the columns, highlight the possibilities to explore right now. As your journey unfolds, update and use this table often.
<table>
<thead>
<tr>
<th>Levels of Influence</th>
<th>Description</th>
<th>Examples</th>
<th>Who is Doing This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>Self-efficacy Knowledge Attitudes Behaviors</td>
<td>Student education Adult caregiver education</td>
<td></td>
</tr>
<tr>
<td>Interpersonal</td>
<td>Relationships Friendships Social networks Social support systems Family Work peers</td>
<td>Peer pledges Family pledges</td>
<td></td>
</tr>
<tr>
<td>Organizational</td>
<td>School Home Neighborhood Healthcare Available programs Rules, policies of the above</td>
<td>Access to cessation programs Rules in the home</td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>Standards Norms Networks Partnerships Coalitions</td>
<td>Campaign for Tobacco-Free Kids and PTA Starting a coalition Forming partnerships</td>
<td></td>
</tr>
<tr>
<td>Public Policy</td>
<td>Federal policy and laws State policy and laws District policy and laws Local policy and laws</td>
<td>Increase taxes on tobacco Increase age to purchase Prohibit flavored tobacco products</td>
<td></td>
</tr>
</tbody>
</table>
Worksheet B—PTA Network

For **125+ years**, National PTA has been making a difference for students and families. As a PTA member, you are part of a nationwide network, with PTA units in all 50 states, Washington DC, Puerto Rico, the U.S. Virgin Islands and Depart of Defense Schools overseas.

This vast network means that your PTA is uniquely suited to attack any critical issue at all the levels mentioned in **Worksheet A—Socio-Ecological Model**. It also means that other PTAs are a natural partner to help you reach your goals.

The PTA network is a powerful resource. PTA is the only organization that is specifically structured to coordinate advocacy and education initiatives on the local, regional, state and national stages, all at the same time. This worksheet is designed to help your PTA discover all the possible ways the powerful PTA network could be used to support your efforts.

Let’s get started! Examine the table below, and do some research. Consider: Who can you learn from? Who can you share resources with? Who can you partner with? Identify and reach out to other PTAs that are already working on an education program and/or advocacy campaign around tobacco/e-cigarette use prevention, including prohibiting flavored tobacco products.

<table>
<thead>
<tr>
<th>PTA Level</th>
<th>What Are They Currently Doing?</th>
<th>What Could They Do to Support Your Efforts</th>
<th>Next Steps Examples: Visit their website, contact them to learn more, meet with their leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our PTA and Members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Local PTAs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District/Council/Region (DCR) PTAs</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>State PTA</td>
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</tbody>
</table>
Worksheet C—Find Your Sweet Spot

To focus your efforts and maximize your potential success, it’s important for your PTA to identify the things that will have the greatest impact and are most likely to create meaningful change. Use this worksheet to find your PTA’s sweet spot, which will be somewhere in the top left quadrant.

The Process: How to Find Your PTA’s “Sweet Spot”

- **Step 1—Gather All Possible Ideas**
  Brainstorm with your PTA leadership and school administrators to identify all the potential ways your PTA could tackle tobacco prevention education and/or advocacy work.
  - Review the information you learned in the [Listen to Your Community](#) section.
If necessary, follow up with potential partners and community members to gather more detailed information.

- Review Worksheet A—Socio-Ecological Model to get ideas for your work.
- Review Worksheet B—PTA Network to see where you might be able to best focus your efforts within the PTA network and to see if you are maximizing your efforts within the network.

**Step 2—Sift and Sort**
- At this stage, you should have a long list of possible ideas! Now it’s time to organize the data.
  - Group like ideas together.
  - Identify common themes.
  - Delete duplicate ideas.

**Step 3—Prioritize Your Community’s Needs**
Invite your PTA leadership and school administrators to rank the themes you’ve identified in your data by impact and changeability.

- Impact Ranking (1-10)
  - Consider each common theme and assign it a value from 1-10 (the higher the number, the greater the impact) based on the difference you feel it will make for students and families. Ask yourself:
    - Will this have real impact?
    - Will this have lasting impact?

- Change Influence Ranking (1-10)
  - Consider each area of impact and assign it a value from 1-10 based on the amount of control your PTA will be able to exercise to directly create change. Just like the impact ranking above, the higher the number, the greater the perceived level of control. Ask yourself:
    - Can our PTA change this area by ourselves?
    - Can our PTA change this area with partnerships and other support?

**Step 4—Find the Work!**
Collect and average the rankings from your PTA leadership and school administrators. Then, chart the values on the graph above.

- Identify the ideas that fall in the top left quadrant of the graph. Congratulations, you’ve found your “sweet spot!” These are ideas that are well within your PTA’s areas of expertise and influence.
- Share the good news with your team (your school community and administration), and your potential partners (other PTAs, local non-profits, local/state coalitions, etc.)!
Worksheet D—PTA Goal Statement and Action Plan
Worksheet D, Section A: What Matters to Your PTA

Finding the right goal/s for your PTA matters. Properly executing your goals matters too! Take some time to answer the questions below.

- **What matters most to our school community?** Use feedback from the survey you sent to your school community, relevant data, and info from your PTA leadership team and school administrators to get a clear picture.

- **What do we have the most influence to change?** Use the findings from Worksheet A—Socio-Ecological Model, Worksheet B—PTA Network and Worksheet C—Changeability Matrix, as well as advice from your PTA leadership team to make a determination.

- **What will have the greatest impact?** Use the findings from your survey, any relevant data from school administrators, information from Worksheet A—Socio-Ecological Model, Worksheet B—PTA Network and Worksheet C—Changeability Matrix, as well as insights from your PTA leadership team to answer.

- **Who is your intended target audience?** This step is critical, as you’ll need to tailor your efforts in different ways to speak to different audiences effectively. To identify your primary audience (you
can have secondary or tertiary audiences, too, if you have the resources), use the information you gathered from your survey, any relevant data from school administrators, information from Worksheet A—Socio-Ecological Model, Worksheet B—PTA Network and Worksheet C—Changeability Matrix.

*• How should we go about doing the work to best accomplish our goals? Use the findings from your survey, any relevant data from school administrators, information from Worksheet A—Socio-Ecological Model, Worksheet B—PTA Network and Worksheet C—Changeability Matrix, as well as insights from your PTA leadership team to determine your path forward.*

*• What steps should we take and who should we partner with to ensure our success? Use the responses from your survey, any relevant data from school administrators, information from Worksheet A—Socio-Ecological Model, Worksheet B—PTA Network and Worksheet C—Changeability Matrix, as well as insights from your PTA leadership team to identify next steps.*

**Worksheet D, Section B: Explore Possible Unique Goals for Your PTA**
Let’s hammer out the details. Use the following questions below to fill out the Goal Creation Table on the next page.
1. **What issue or issues are you addressing?** Write them in the first column of the Goal Creation Table.

2. **Identify the Socio-Ecological Model level associated with each issue** you added to the first column. Add those levels to the second column.

3. **Consider: Is there a policy or procedure that needs to be changed to address the issues you’ve selected?** Will you need to advocate for or against something? Clearly identify which advocacy arena you’ll need to influence and add it to the third column.

   ✓ School ✓ Local ✓ State ✓ Federal

4. **Who are your partners?** Determine who will partner with you and in what ways, and then add them to the fourth column of the Goal Creation Table (remember to also add them to your Worksheet E—Identify Partners). To identify your partners, ask yourself:

   ✓ What will they commit to? ✓ What can we learn from them? ✓ How will we collaborate with them?

5. **What is the timeframe for addressing each issue?** Be realistic and add some wiggle room just in case. Once you’ve agreed as a team, add the info to the fifth column of the Goal Creation Table.

6. **With the information you’ve entered in columns one through five, can you start creating your possible goal(s)?** Draft your possible PTA goals in the final column of the Goal Creation Table—they don’t have to be final at this stage, just close enough to be useful in your discussion.

7. **Now that your Goal Creation Table is complete, step back and consider all of the information you’ve entered.** Out of all of the possible goals, select one or two that your PTA will commit to this year. To make it official, highlight the row(s) that contain your goal(s)!

**PTA Goal Creation Table**

This page is where the magic happens! Don’t be afraid to get messy. Add all the information you need to make your decisions.

<table>
<thead>
<tr>
<th>Issue Area</th>
<th>Socio-Ecological Level</th>
<th>Advocacy Level</th>
<th>Potential Partners</th>
<th>Estimated Timeframe</th>
<th>Possible Goal</th>
</tr>
</thead>
</table>

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Worksheet D, Section C: Our Goal Statement

Now it’s time to finalize your goal statement. You’ll need to make sure your goal is **SMART**: Specific, Measurable, Attainable, Relevant and Timebound.
You will eventually share this goal statement with your partners, decision-makers and your wider school community, so make sure it clearly states what you are doing, to whom you are doing it, how you will do it and when you will do it. Let’s start by identifying how your goal meets each of the SMART standards.

**Our Goal is SMART**

- **Specific:**

- **Measurable:**

- **Attainable:**

- **Relevant:**

- **Timebound:**

**Our Final Goal Statement**
Worksheet D, Section D: Complete an Action Plan

Now that you have a Goal Statement(s), it’s time to develop a strategic, step-by-step Action Plan. You’ll accomplish this by using the tables below. As you fill out each table, take a brief pause to check in with yourself and your team.

Consider the following questions:

- Have you read the Local PTA Leader Guidance for Diversity, Equity and Inclusion efforts developed by National PTA and its partners?
- Did you work with and receive buy-in from school administrators and staff members?
- Have you engaged with and considered the needs of your full PTA membership?
- Is there a way to engage more families? How about the wider community? You can find expert resources and tips on the National PTA Center for Family Engagement website.
- Are you planning for how to ensure your work continues through leadership changes, both within your PTA and with decision-makers?

Long-Term Goal #1

Table A: Our Action Plan At-a-Glance

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Strategies to Meet Our Goal</th>
<th>Performance Measures with Deadlines</th>
<th>Barriers and Opportunities</th>
<th>Strategic Approach for Addressing B/O</th>
<th>Responsible Team Member</th>
<th>Notes (Process, Deliverables, Key Dates)</th>
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### Table B: Strategy 1 Details

<table>
<thead>
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<th>Strategy to Meet Goal</th>
<th>Action Step for This Strategy</th>
<th>Due Date</th>
<th>Primary Person Responsible</th>
<th>Team Members</th>
<th>Estimated Cost</th>
<th>Priority Level</th>
<th>Status</th>
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**Notes for Tables B & C:**

- In the Priority Level column, assign each action step a value from most-to-least pressing, with 1 being the highest priority and 3 the lowest.
- In the Status column, indicate if the action step is On Time (OT), Behind (B) or Complete (C).

### Table C: Strategy 2 Details

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<th>Strategy to Meet Goal</th>
<th>Action Step for This Strategy</th>
<th>Due Date</th>
<th>Primary Person Responsible</th>
<th>Team Members</th>
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Long-Term Goal #2
Table D: Our Action Plan At-a-Glance

<table>
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<th>Strategic Goal</th>
<th>Strategies to Meet Our Goal</th>
<th>Performance Measures with Deadlines</th>
<th>Barriers and Opportunities</th>
<th>Strategic Approach for Addressing B/O</th>
<th>Responsible Team Member</th>
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Table E: Strategy 3 Details

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Notes for Tables E & F:

- In the Priority Level column, assign each action step a value from most-to-least pressing, with 1 being the highest priority and 3 the lowest.
- In the Status column, indicate if the action step is On Time (OT), Behind (B) or Complete (C).

Table F: Strategy 4 Details

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<th>Action Step for This Strategy</th>
<th>Due Date</th>
<th>Primary Person Responsible</th>
<th>Team Members</th>
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Worksheet D, Section E: Your Statement of Success

As you tick off items in your Action Plan, it’s important to keep envisioning exactly what success will look like when you achieve your goal. To help, draft a Statement of Success in this section.

Think of your statement of success as a vision statement. For example, the National PTA Vision Statement says, “Every child’s potential is a reality.”
Our PTA Statement of Success is ...

Worksheet E—Identify Partners

Remember, we are stronger together. Some partners will stand side-by-side with you as you work to accomplish similar goals, while others will do work that falls in a different category that still supports the overall effort. Use this worksheet to keep track of your potential partnerships.

In the table below:

1. Write all possible partners in the first column. Don’t forget to review the work you completed back in Step 2.
2. In the second column, explain what they do—what each partner is working to accomplish.
3. In the third column, note how they can help support your efforts. Remember, partnerships must benefit all parties involved. To determine how each partnership will help you reach your goals, ask yourself:
   a. Can you learn from them?
   b. Can you co-author a position statement?
   c. Can you visit decision makers together?
   d. Can you co-host an educational session?
   e. Can you form a coalition with them?
4. Lastly, reach out to them and confirm the partnership. Add contact info in the final column.

<table>
<thead>
<tr>
<th>Possible Partner</th>
<th>What They Do</th>
<th>How They Can Help</th>
<th>Confirm Partnership</th>
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