



# Grassroots Advocacy Trainer's Manual



## Module 1: Advocacy



### GOALS

By the end of this module, participants should be able to understand:

- The rich advocacy history of National PTA.
- The specific niche of grassroots advocacy National PTA holds in comparison to other service-minded organizations.
- The process for turning a problem into a grassroots issue campaign.



### TIME

**Total: 45 minutes**

- Presentation: 35 minutes
- Video: 10 minutes



### OVERVIEW

In this section, participants will learn about the advocacy history of PTA, the various types of service organizations working to improve social issues, and the early stages of launching a grassroots advocacy campaign.



### MATERIALS NEEDED

- Easel paper
- Masking tape
- Dark markers
- Video: PTA Advocacy – A Legacy in Leadership. If your training room has access to wifi you can access the video directly on YouTube: [Youtube.com/watch?v=VPf1\\_ojajlc](https://www.youtube.com/watch?v=VPf1_ojajlc). If you are unsure, you should download the video from PTA's website prior to the training: [PTA.org/advocacy/content.cfm?ItemNumber=2720](https://pta.org/advocacy/content.cfm?ItemNumber=2720).



### HANDOUTS

- PowerPoint Printout
- Advocate for PTA
- Strategy Chart Blank
- Strategy Chart Sample



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 1: ADVOCACY HISTORY



#### SAY

By the end of this module, you should be able to understand:

- The rich advocacy history of National PTA.
- The specific niche of grassroots advocacy National PTA holds in comparison to other service-minded organizations.
- The process for turning a problem into a grassroots issue campaign.



#### ASK

How many of you have met someone who thought PTA was all about bake sales and fundraisers?



#### SAY

Nearly everyone! This is a perception that is absolutely incorrect. National PTA was founded by advocates, and has a strong history of impacting education policy and advocating — NOT fundraising — for children. We are going to kick off this training with a brief video about PTA's history of advocacy, and the concrete improvements now realized for children as a result of our work.



#### PLAY VIDEO:

**PTA Advocacy – A Legacy in Leadership**



#### DISPLAY ON A FLIPCHART OR POWER POINT:

##### **National PTA Public Policy Priorities**

- General education
- Special education
- Early childhood education
- Education funding
- Child health and nutrition
- Juvenile justice and delinquency prevention
- School safety



#### SAY

As you saw in the video, PTA is the oldest and largest volunteer child advocacy association in the United States. Founded in 1897, PTA has a long, successful history of influencing federal policy to promote the education, health, and well-being of all children — resulting in kindergarten classes, child labor laws, school lunch programs, a juvenile justice system, and strengthened parent-teacher relationships. PTA continues that legacy today by fighting for change under its federal public policy priorities:

*Family engagement and general education* - Reauthorization of Elementary and Secondary Education Act—No Child Left Behind (ESEA-NCLB) remains a top goal for National PTA, including improvements that prioritize capacity building for the implementation of systemic and sustainable family engagement practices that increase student achievement. In addition, PTA is fighting for improvements to ESEA-NCLB, including access to well-rounded curricula, equity protections for disadvantaged populations, and accountability to parents and the community.

*Special education* - Through the reauthorization of ESEA-NCLB and implementation of the Individuals with Disabilities Education Act (IDEA), PTA will continue to advocate to ensure that all students graduate college and are career-ready, that family engagement remains a fundamental principle of IDEA, and that the rights of children with special needs and their parents are fully protected.

*Early childhood education* - PTA supports federal and state incentives for high-quality child care and preschool programs that are affordable and accessible, coordinated at all levels, characterized by high standards for teaching, training, health and safety, and able to incorporate strong family engagement components.

*Education funding* - Federal investment in quality education is critical to our nation's long-term success. PTA supports the need to safeguard vital education investments in all federal deficit reduction efforts, secure dedicated funding for family engagement in Education, increase funding for IDEA, and maintain or increase investments in quality early learning programs.

*Child health and nutrition* - National PTA strongly supports continued implementation of the Healthy, Hunger-Free Kids Act of 2010. This includes implementation of federal guidelines for minimum nutrition standards for all foods sold to students in school; guidance and technical assistance on local wellness policies, and the continued support for improved nutrition standards for meals served as part of the National School Lunch Program.

*Juvenile justice and delinquency prevention* - Protecting the rights of children and youth involved in the justice system continues to be an area of focus for PTA. In 2013, PTA will advocate to ensure that youth who are truant are kept out of secure juvenile corrections facilities by elimination of the Valid Court Order exception to the Deinstitutionalization of Status Offenders Core Requirements in federal legislation. PTA will also work to ensure that Jail Removal and Sight and Sound Separation core protections are extended to all children less than 18 years of age.

*School safety* - School safety is a crucial component of effective learning, and a core tenet of the National PTA. PTA believes that the safety of children and faculty in all school settings is a fundamental right, and has made it the utmost priority for our programmatic and advocacy work. In 2013, PTA will work to support federal programming and policies related to safe routes to school, bullying prevention, and the protection of children from gun violence.



## GRASSROOTS ADVOCACY 101



### DISPLAY ON A FLIPCHART OR POWERPOINT (GRAPHIC)

#### Organizing Forms:

- Service
- Education
- Speaking out for others
- Grassroots



#### SAY

We can keep putting Band-Aids over the holes in the dam, but until we repair the dam itself, it will keep leaking. This is where advocacy comes in. Advocacy is required to achieve significant reform in education. This section will introduce the four basic forms of organizing, but our entire training focuses on grassroots advocacy. I want to be clear about what we mean by the term grassroots advocacy in this session because it can have different meanings to different people.

There are many ways to achieve social change, and all have their uses. PTA even utilizes all these forms of social change in our overall advocacy efforts. An example of direct service organizing would be a PTA unit purchasing new computers for a school that cannot afford them. This temporarily addresses the issue today and provides a direct service to students and the school.

A second form is research and education on an issue. PTA produces issue briefs from time to time on pressing education issues, like family engagement or local wellness policies. The purpose is to collect information on a specific topic and educate members and the public on that particular issue.

Thirdly, there is the concept of speaking out on behalf of other people. PTA does this all the time: speaking up for every child with one voice. All of these forms of advocacy are important in their own right, but all are different from the kind of social change that will be the subject of this workshop.

The type of social change we are talking about here is called grassroots advocacy. What we mean by grassroots advocacy is that the people directly affected by a problem take action to win a solution. Here is an example of how grassroots advocacy is different from the other kinds of social change work I just mentioned:

*Suppose that I am living in a community where homelessness is a problem.*

- If I set up a volunteer group to open a soup kitchen or a shelter, that would be an example of a service approach.
- If I studied homelessness and tried to count the number of people without homes and then widely distributed the information, then that is an education approach.

- If I go to city hall and lobby for more shelter beds, that would be speaking out on behalf of others. The people without homes would not necessarily be involved or even know that I was doing it. I would be advocating for others.
- However, if I organize a large number of homeless people to first decide on the solution that they want, and then THEY pressure the city to win it, that would be a grassroots advocacy approach.

The people directly affected by the problem take action to win a solution. They might decide to fight for more shelter beds or they might join together with other groups to make the city allocate money to build affordable housing. The solution can be whatever the group decides. When the people directly affected by a problem take action to solve it, that is what we are calling grassroots advocacy. Grassroots advocacy in this sense is based on the power of the people with the problem to take collective action on their own behalf.



## DISPLAY ON A FLIPCHART OR POWERPOINT

### Three Principles of Grassroots Advocacy:

- Win solid improvements.
- Make people aware of their own power.
- Alter the relationships of power.



### SAY

There are three fundamental principles of grassroots advocacy. First, you want to win concrete improvements in people's lives. We will talk more about how to set short-term, intermediate and long-term goals in the strategy module. You should always have a concrete goal that you are working toward.



### TRAINER NOTE

If you are not conducting the Strategy Module in your training, distribute the "Strategy Charts" (blank and sample) so they will have access to this important resource.



### SAY

Second, you want to make people aware of their own power by achieving these goals. The short term goals are smaller stepping stones, and something to keep your members motivated for the long haul of education reform. And third, you want to alter the relations of power between people and the government by building strong, permanent, local, state and national organizations. PTAs that have participated in this training and used the skills for their issue campaigns have all reported that they have significantly improved their status in the education community. They are now players where they may not have been before.

## MAKING THE LEAP INTO GRASSROOTS ADVOCACY



### SAY

Until now, your PTA may have been involved in some or all of the different types of advocacy, depending on what you were working on. But for issue campaigns and addressing the underlying causes of the problems in your state, district or school, grassroots advocacy is the most powerful approach. How do you make the leap from plugging that leak to fixing the dam?



### DISPLAY ON A FLIPCHART OR POWERPOINT:

#### Creating your Grassroots Advocacy Campaign

- Step 1 – Identify the problem
- Step 2 – Turn the problem into an issue campaign
- Step 3 – Create your strategy
- Step 4 – Advocate!

*Step 1 - Identify the problem* – What is the problem that your PTA can address? Did your state cut school funding? Did your district cut bus service? Does your school have safety problems during drop-offs or pickups?



### ASK

Can someone provide an example of a problem that your state/local PTA is facing?



### TRAINER NOTE

Get a few examples, and use one problem to walk through this step-by-step process. Look for a problem that all attendees can relate to like school funding cuts.



### SAY

So let's look a little closer at Joe's problem of school funding being cut. If we were solely a service association, we might only do a fundraiser for our school to help close the budget gap. If we were solely an education association, we might only conduct a study that identifies the impacts of funding cuts on students. If we were solely speaking for others, we might only pay for a lobbyist to head to the capital and lobby for more school funding. But we are also a grassroots advocacy association, so we will create an issue campaign that families will rally behind and address for themselves.



*STEP 2 – Turn the problem into an issue campaign by identifying the solution.* In this instance, our campaign might be called the PTA campaign to adequately fund public schools. Taking a look at some of National PTA's policy priorities: the problem of childhood obesity was turned into the issue campaign of improving school lunch nutrition.

So you have your issue, but now is not the time to start your picket lines or meetings with your governor. Any successful campaign needs a plan or a strategy.

*Step 3 – Create your strategy using the Strategy Chart.* Each column of the strategy chart builds upon the last so it is important to work through the columns in order, as best as possible. We have provided you a blank chart that you can use as your template, and a sample strategy that explains each of the components.

*Step 4 – Launch your campaign!* Make sure that you celebrate the small victories along the way to keep your members inspired and energized. Some of these issues are short and some will take years to accomplish — so it is vital to constantly grow your team.

# HANDOUTS

# ADVOCATE WITH PTA



All PTA® members can be advocates.  
In fact, you may be an advocate already.  
If not, become one today!!

## WHAT IS ADVOCACY?

In the context of PTA, advocacy is supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children.

## ADVOCATING FOR FEDERAL POLICY

PTA is the oldest and largest volunteer child advocacy association in the United States. Founded in 1897, PTA has a long, successful history of influencing federal policy to promote the education, health, and well-being of all children—resulting in kindergarten classes, child labor laws, school lunch programs, a juvenile justice system, and strengthened parent-teacher relationships. PTA continues that legacy today by fighting for change under its federal public policy priorities:

- Family Engagement in Education
- Opportunity and Equity for all children
- Child Health

## ADVOCATING FOR STATE POLICY

State laws can have a major impact. Involving PTA members in state and local advocacy can play a pivotal role in securing adequate state laws, funding and policy for the education and well-being of our children.

## WAYS TO ADVOCATE

Child advocates work with policy makers at the federal, state, and local levels to ensure sound policies that promote the interests of all children. Here are a few ways PTA members can influence policy:

- Educate members of Congress and their staff on PTA's federal public policy priorities.
- Sign up for the PTA Takes Action Network at [www.pta.org/takeaction](http://www.pta.org/takeaction) and respond to action alerts to reach your legislators on important issues and legislation.
- Work with the school to implement a strong family engagement policy, as required by federal law.



- Serve on the school board; attend school board meetings.
- Attend school district meetings on such topics as healthy alternatives in the lunchroom and federal, state, and local budget cuts.
- Work with school leaders and state education officials to implement PTA's National Standards for Family-School Partnerships.
- Write a letter to the editor about the importance of family engagement in education.

## ADVOCACY RESOURCES

Go to [PTA.org/TakeAction](http://PTA.org/TakeAction) for the following resources to help you speak up for federal, state, and local policies that benefit our children:

- **PTA Takes Action Update:** A monthly electronic newsletter about federal legislation affecting families, schools, and communities, plus action alerts that help members make a difference on key issues.
- **PTA Public Policy Agenda:** National PTA's recommendations on key legislation and policies up for consideration by Congress and the Administration.
- **Online Advocacy Toolkit:** How-to's for building relationships with members of Congress, working with the media, and understanding the legislative process.
- **Policy Issue Briefs:** Information on research, best practices and federal legislation related to PTA's public policy priorities. Issue briefs detail the history of the law and PTA's involvement on the issue, explains current provisions in the legislation, and highlights best practices and research in the field.



- **PTA Policy Issue Cards:** Brief synopses of National PTA's positions and key messages on important issues of the day, ranging from education funding to safe school environments.
- **State Laws on Family Engagement in Education:** A reference guide on family engagement provisions within state education laws, intended to help families better advocate for their children at the school and district level, to guide development of legislative reform initiatives by policy makers and advocates, and to support efforts to monitor the implementation of laws already in place.
- **Common Core State Standards Initiative (CCSSI):** Resources to support the adoption and implementation of common core state standards. CCSSI is a voluntary, state-led effort to develop clear, consistent academic standards in English language arts and mathematics.

Through the PTA network, you also have access to advocacy support in the form of training and leadership:

- **Policy workshops & Training of Trainers:** National and state PTA conventions, as well as the National PTA Legislative Conference, offer federal and state policy workshops each year. National PTA also hosts advocacy training of trainers workshops to engage and educate parent advocates at every level, whether on the district, state, or federal level.
- **PTA federal legislative chairs:** these state leaders ensure that all members have information about PTA's federal policy priorities and lead members in speaking on behalf of children and youth. They have relationships with their states' U.S. senators, representatives, and congressional staffers, and coordinate their states' responses to PTA action alerts. To get in touch with your state's federal legislative chair, contact your state PTA office.
- **Legislation Committee:** Appointed by the President of NPTA, the Legislation Committee serves as an advisory group to the Office of Public Policy and the Board of Directors on key policy and advocacy initiatives.

## JOIN THE PTA TAKES ACTION NETWORK TODAY!

Sign up at [PTA.org/TakeAction](http://PTA.org/TakeAction)



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**PTA®**  
everychild.onevoice.®

# MIDWEST ACADEMY STRATEGY CHART

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities. Develop a timeline.

GOALS	ORGANIZATIONAL CONSIDERATIONS	CONSTITUENTS, Allies & Opponents	TARGETS (Decision Makers)	TACTICS
<p><b>Goals are what we want to WIN!</b></p> <ol style="list-style-type: none"> <li>List the long-term goals of your campaign.</li> <li>State the intermediate goals for this issue campaign. What constitutes victory?</li> </ol> <p><b>How will the campaign:</b></p> <ul style="list-style-type: none"> <li>Win concrete improvements in people's lives?</li> <li>Give people a sense of their own power?</li> <li>Alter the relations of power?</li> </ul> <ol style="list-style-type: none"> <li>What short-term or partial victories can you win as steps toward your long-term goal?</li> </ol>	<ol style="list-style-type: none"> <li>List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, canvass, etc.</li> </ol> <p><b>What is the budget, including in-kind contributions, for this campaign?</b></p> <ol style="list-style-type: none"> <li>List the specific things you need to do to develop the campaign and ways in which the campaign will strengthen your organization. Fill in numbers for each.</li> </ol> <ul style="list-style-type: none"> <li>Expand leadership group</li> <li>Increase experience of existing leadership</li> <li>Build membership base</li> <li>Expand into new constituencies</li> <li>Develop Issue Campaign Message</li> <li>Develop Media Plan</li> <li>Develop a Fundraising plan – how can you raise money for and through this campaign?</li> </ul> <ol style="list-style-type: none"> <li>List the internal (organizational) problems, that must be considered if the campaign is to succeed.</li> </ol>	<ol style="list-style-type: none"> <li>Who cares about this issue enough to join or help the organization? <ul style="list-style-type: none"> <li>Whose problem is it?</li> <li>Into what groups are they already organized?</li> <li>What do they gain if they win?</li> <li>What risks are they taking?</li> <li>What power do they have over the target?</li> </ul> </li> <li>Who are your opponents? <ul style="list-style-type: none"> <li>What will your victory cost them?</li> <li>What will they do/spend to oppose you?</li> <li>How strong are they?</li> <li>What power do they have over the target?</li> </ul> </li> </ol>	<p><b>1. Primary Targets</b></p> <p>A target is always a person. It is never an institution or an elected body. There can be more than one target but each need a separate strategy chart as your relationships of power differs with each target.</p> <ul style="list-style-type: none"> <li>Who has the power to give you what you want?</li> <li>What power do you have over them?</li> </ul> <p><b>2. Secondary Targets</b> (You don't always have or need secondary targets)</p> <ul style="list-style-type: none"> <li>Who has power over the people with the power to give you what you want?</li> <li>What power do you have over them (the secondary target)?</li> </ul>	<ol style="list-style-type: none"> <li>For each target, list tactics that each constituent group can best use to put pressure on the target to win your intermediate and/or short-term goals.</li> </ol> <p><b>Tactics must be:</b></p> <ul style="list-style-type: none"> <li>In context</li> <li>Directed at a specific target</li> <li>Backed up by a specific form of power</li> <li>Flexible and creative</li> <li>Make sense to members</li> </ul> <p><b>Tactics include:</b></p> <ul style="list-style-type: none"> <li>Phone, email, petitions, LTE, OP ED,</li> <li>Media events</li> <li>Actions for information</li> <li>Public Hearings</li> <li>Non-Partisan Voter Registration and Education</li> <li>Non-Partisan GOTV</li> <li>Accountability Sessions</li> <li>Negotiations</li> <li>Elections</li> <li>Law Suits</li> <li>Strikes</li> </ul>



# ***MIDWEST ACADEMY STRATEGY CHART***

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities

<b>GOALS</b>	<b>ORGANIZATIONAL CONSIDERATIONS</b>	<b>CONSTITUENTS, Allies &amp; Opponents</b>	<b>TARGET(S)</b>	<b>TACTICS</b>

## Module 2: Strategy



### GOALS

By the end of this module, participants should be able to:

- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the Midwest Academy Strategy Chart to plan PTA activities and incorporate ways to build PTA into each activity.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

This is the main part of the training, all other pieces flow from it. Starting with a blank strategy chart on a black/white board or wall, the trainer goes through the five columns: Goals, Organizational Considerations, Constituencies, Decision-makers, and Tactics. Next, show how each plays a vital role in developing a workable, winning issue campaign strategy that builds the organization. The objective is to get the participants to think strategically whenever they think about working on an issue. The natural tendency is to think tactically (i.e., “What event or demonstration can we conduct to dramatize our situation?”). The job of the trainer is to get the participants to hold all thoughts of tactics until the end of the process.

Space needs to be identified for small groups of up to eight people each. There is only time for one trainer to debrief three charts. If you have more than 24 people then it is best to create six groups of four people each. After the groups work on their charts for 20 minutes each, the trainer then debriefs three groups in separate rooms. If the main training room is very large, several small groups can meet in it. Others will need breakout rooms or space where six-to-eight people can meet, hear each other, and fill out the chart.



### MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



## HANDOUTS

- PowerPoint Printout
- Strategy Chart Blank
- Strategy Chart Sample
- Strategy Exercise (Federal, State or Local from Exercise Kit)



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 2: STRATEGY



#### SAY

By the end of this module, you should be able to:

- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the “Strategy Chart” to plan PTA activities and incorporate ways to build PTA into each activity.



#### INSTRUCTOR NOTE

Strategy charts should never be displayed on an easel. Always show all five columns at once. This is also true when you debrief the group's charts. A chart can't be debriefed a page at a time, you must always be able to see the whole chart and how the columns relate.



#### SAY

The strategy chart is one of the most useful tools that we have found for consistently doing good planning. The value of the chart is that it poses the right questions in the right order. Learn how to use it for planning individually, but also for leading group discussions. It prevents people from going on too many tangents, and it provides an outline for the discussion.

At first glance, the chart appears to be a series of lists. Actually, it works like a spread sheet. All five columns need to be wired together, so that if anything changes in one column, you must make appropriate changes in the others. As in a spreadsheet, there are certain mathematical relationships in the chart. Your demands have to be equal to your power, and your tactics must have a direct cost to your target. I'll explain all of this in a moment, but first:



#### ASK

**Who remembers the difference between a strategy and a tactic?**

*[Answer: The strategy is the overall plan. A tactic is something you do to carry out the plan. It is a step in carrying out the plan.]*



## DISPLAY ON A FLIPCHART OR POWERPOINT:

The chart consists of five columns which correspond to the five basic elements of strategy:

1. **Goals:** The victory you want to win.
2. **Considerations:** What you have to put into the fight, and what you want to get out of it organizationally.
3. **Constituents:** The answer to the question, who else cares about this problem enough to join us in doing something about it?
4. **Decision-Makers:** Those who can give you what you want.
5. **Tactics:** The things that you and your constituents do to the decision-makers to make the target give you what you want.



## INSTRUCTOR NOTE

Remind the group of the difference between a problem and an issue that was mentioned in the introduction.

- The problem is what is wrong.
- The issue is the solution for which you are working.



## SAY

Let's go over these, one column at a time.

## 1. GOALS

The Goals column can be divided into three categories: long-term, intermediate, and short-term goals. This is done to encourage you to think of organizing as a process that goes on over a period of time, rather than a one-shot episode for a limited objective. It helps to break larger issues down into smaller winnable components, which in turn, gives you a chance to build the organization.

- **Long-term goals:** These may extend beyond the particular campaign on which you are presently working. For example, a local PTA may have a long-term goal of improving the health and lowering the obesity rates of children in their school.
- **Intermediate goals:** The intermediate goals are the issues you want to win in this campaign. For the local PTA in the example above, it might be to require that physical education programs be restored to all schools in the district.
- **Short-term goals:** Short-term goals are steps towards your intermediate goals. The local PTA might request that the school board hold a community hearing on the physical condition of school children in the district. The hearing will give you a local activity around which to build the campaign, and create a forum in which to present the adverse effects of cutting the Physical Education program and demonstrating your power. If you are in a large city, you might request several hearings to organize people in different neighborhoods.
- To survive, particularly in a long campaign, a group must move from victory to victory. Always build in some small but quick victories, if for no other reason than it builds morale.



- Once you have done a chart for the overall campaign, go back and do others for each of the short-term and intermediate goals. An actual working strategy chart only applies to one level of goals, the goal on which the group is about to take action, but it is necessary to see where this fits into the larger campaign.
- Remember that we use the word “goals” a bit differently than in everyday language. In the chart, a goal can only be something that you intend to win from someone. If you want to build your membership, that isn’t considered a goal here, it goes in the next column, Organizational Considerations. If you want to educate people about an issue, that also isn’t a goal in the strategy chart, it is tactic, and goes in the last column. Goals are always what you want to win in an issue campaign.



## INSTRUCTOR NOTE

Occasionally, someone questions this definition of the word “goal,” or says that according to the dictionary there is really no difference between goals and objectives. Do not get into an argument about this, or any other use of language definition. Simply say that they are right, but that we are using the words a little differently. In this case, we want to make a distinction between issue goals and organizational goals.



## SAY

Let’s look at the second column.

## 2. ORGANIZATIONAL CONSIDERATIONS

We are going to look at the three elements of organizational considerations:

- Resources
- Organizational gains
- Internal problems



## INSTRUCTOR NOTE

Separate the column for organizational considerations into three parts.

- First — list the resources that the organization has to invest in the campaign.
- Second — list the gains the organization hopes to realize from the campaign.  
Stress the importance of asking “How will this campaign build the organization?”
- Third — list internal problems.



## SAY

### First, Resources

What is the organization going to invest in this campaign? How much volunteer time? How much money and leadership time? What additional resources does it bring: members, reputation, physical facilities, press contacts, allied groups, or research ability? This is the place to put the campaign budget. Every campaign ought to have its own budget. This is also where staff time allocations are made if there is any staff and volunteer allocations. Don’t count people or resources twice. If someone is doing another task within PTA, put down a realistic fraction of their time for this campaign.

## Next, Organizational Gains

What do you want the organization to look like after the campaign? How many new PTA members? How many new members can be added to particular committees? Put in the number. How many people will take on greater leadership responsibility? Name them if you can. How much money can be raised during the campaign? What new allies do you want to make? Don't say, "more" or "better." Give specific names and numbers! These organizational gains are often confused with issue goals, and people put them in the first column by mistake.

## Finally, Internal Problems

List any problems internal to your organization that are going to get in the way of the success of the campaign. By internal problems we mean things like budget problems, racial and ethnic tension, personality clashes among leaders, too few volunteers, etc.

Develop plans for eliminating or dealing with them.



## SAY

Let's move on to the third column. Now we are going to look closer at the subject of constituents, allies, and opponents.

## 3. CONSTITUENTS, ALLIES, AND OPPONENTS

### Constituents

The Constituency column is where you list all the people and organizations that can be activated in some way to support you. The level of activity may vary from signing a petition to actually attending an event. This column is the answer to the question, "Who cares about this issue?" List everyone who cares, why they care and how many of them there are. Is there some reason why the target would be worried by their participation in your campaign?

The point here is to list the way people are organized or grouped. It isn't helpful to say that "everyone" cares, or "all the transit riders care," because you usually can't reach everybody one by one. You can best reach people who are organized, live in certain places, belong to certain churches, community groups or unions, read certain publications in which you can advertise or get a story, or are on certain mailing lists, etc. If you need to mobilize a lot of people quickly, or build a multi-organization campaign, then think of how people are already organized. If your unit wants to develop its own membership, then think about how the issue affects people as individuals, and where to find the most strongly affected people.

When listing people and groups that might be interested in, or affected by, the issues be as expansive as possible, even far-fetched. Then, separate out those you really want to be a part of the organization or campaign, those you want as allies, those you want to neutralize, and those you want to keep away. Think outside the box. Often, stronger communities

(e.g., stronger communities may have a very active PTA unit, strong community organization, active NAACP branch, strong education coalition, etc.) already have school board members, city council members or legislators who support our positions. The problem is that there are not enough of them and we need to get additional support from other communities.

## Allies

Allies are people who support us, but who, for whatever reason, are not potential members of our organization. For example, the Latino Action Network might work very closely with us on some issues but must maintain its own organizational identity for a variety of reasons. We'll talk more about this when we discuss building coalitions. Individual policy-makers can also move from target to ally and vice-versa.

## Opponents

List the groups or individuals who will actively oppose you. You may not be able to do anything about them, but it is useful to anticipate who will be on the other side. Do not get sidetracked into fighting with your opponents. They do not have the power to make the decision. Our job is to show the target that we have more power than the opposition.



## SAY

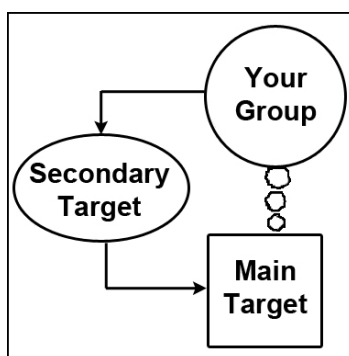
Let's take a look at our fourth column, targets (decision-makers).

## 4. TARGETS (DECISION-MAKERS)

There are two types of targets: primary decision-makers and secondary targets.



## DRAW ON CHART



## SAY

**First, let's consider the primary decision-maker.**

The primary decision-maker is the person who can give us what we want and is not necessarily a bad person. A person becomes the target of the campaign just by virtue of having the power to make (or not make) the decision we want. If there is no clear target, we are unlikely to have a successful campaign. The decision-maker is always a "who." It is always a person or persons who have the power to give us what we want. A target is

not a department such as the Board of Education. However, the specific, individual board members can be targets. It is not the legislature, or a building (city hall). It is one or more individuals who are in a position to say “Yes” or “No” to our demands. Individuals are the weak link in any institution. As an institution, our legislators may have a mutually agreed upon policy. But, as individuals, each one has a different set of fears, likes, dislikes, ambitions, rivalries, business interests or political connections. We can win over individuals by appealing to their personal self-interest.

- Our ability to get a decision-maker to give us what we want is a function of our power over him or her, not a function of how polite or impolite we might be, how smart we are, or how much research we did, although all that helps. In dealing with decision-makers, we have to demonstrate our power.
- When the primary decision-maker is the head of a corporation, power is usually measured in the dollars that might be lost by the company, or in our ability to bring regulatory agencies into the situation. When the primary decision-maker is an elected official, power is measured in votes. Do we hold the balance of power? Will our members really vote on the basis of this issue? Is there someone else to vote for? An elected official usually knows if our constituents have never voted for him and never will, in which case we have very little power, and we need to find ways to cut the issue so as to get support from a broader range of people.
- Determining the basis of our power over a primary decision-maker is critical to our overall strategy. A misjudgment here can negate the best of all other plans.

**Next, there is the secondary target or indirect power person.**

- Remember, we just finished discussing primary targets/decision-makers: The people who can give you what you want.
- Secondary targets: People over whom you have more power than you have over your primary target/decision-maker. They, in turn, have more power over the primary decision-maker than you do. For example, in the Physical Education campaign that I mentioned earlier, let's say that the superintendent of schools is an appointed official. The local PTA has no direct power over this individual. However, let's say that the school board is appointed and the superintendent is appointed by the mayor (who is elected). Citizens vote for the mayor, and the mayor is responsible for the actions of those he or she appoints. You target the mayor as the primary decision-maker. If you are unable to get a meeting with the mayor, you might look for a secondary target who can pressure the mayor to meet with you. For example, a major contributor to the mayor's campaign over whom we have some power such as a local storeowner, or award leader who turns out a big vote for the mayor and has many active PTA members in the ward. There is not always a secondary target. If your target is an elected official and large numbers of your constituents register to vote, and if your campaign is a popular one, then you will have direct power over the politician. When listing decision-makers, clearly label them primary and secondary targets, and indicate who is useful in putting pressure on whom.

- To repeat, because primary decision-maker are often elected officials, it is important that you understand the political context in which you will be operating. The PTA is nonpartisan and does not endorse candidates. However, we still need to know the electoral process, the electoral numbers and the dates of the primary and general elections. When was the primary decision-maker's last election? Is the school board election at the same time as other local elections or is it a stand-alone election? Are members elected by district or at large? How long has she or he been in office? How many people voted in the last election? How many votes did the target get?
- By finding out these numbers, we will be able to determine how many people we need to organize to effectively influence the primary decision-maker.



## SAY

Let's take a look at our fifth column, tactics.

## 5. TACTICS



## INSTRUCTOR NOTE

Dramatically point to the appropriate columns of the Strategy Chart as you say the words below.



## SAY

- Tactics are what the people in the Constituents column do to the people in the Targets (Decision-Maker) column to apply pressure to them and make them give us the things in the Goals column in such a way that it builds the organization as in the Organizational Considerations column. For every tactic, there must be someone to do it, someone to whom it is done, and some reason why the person to whom it is done doesn't want it done and will make a concession to us to get us to stop doing it.
- This is the fun part. Develop clever tactics that demonstrate and build power and make sense to your members. Be as creative as possible while remembering to go through the other four steps in the strategy first.
- The main point in tactics is that any tactic has to have an element of real power behind it. It is not just something to show how you feel about an issue. Tactics are chosen in relationship to how much power the organization has. We often say that a good tactic is like standing on the decision-maker's foot until s/he pays you to go away. Hearings, rallies, petitions, meetings with the target and leafleting are all tactics, and all require the organization to have some measure of power. For example, bringing off a successful community meeting at which a state legislator is held accountable requires a more powerful group to organize it. We are simply making it clear that we cannot support people whose actions are opposed to ours and our children's best interests. There was a suburban group that was unhappy with a position taken by the area's state representative. They invited him to a gathering and served coffee, cake and cookies. It was very proper, but everyone in the room had either worked in, or given money to, his campaign. There could not have been a stronger show of power. When they expressed their displeasure with his stand on the legislative issue with which they were concerned, he clearly understood the power they had. It did not need to be said.



- Tactics such as holding signs outside an elected official's office have symbolic value and can be a good media kickoff for a campaign, but they are not a substitute for a strong voting bloc. Another element in choosing tactics is that they are outside the experience of the target and within the experience of the people we are organizing. Our members need to be comfortable with the tactics.
- If your PTA unit conducts voter registration drives make sure that you include voter registration as one of your tactics and incorporate it into as many activities as possible. For instance, at community forums, candidate forums, accountability sessions, or any large action, encourage everyone to register to vote and have registrars present. Do this in a very visible way to indicate that you are building the power of your unit.

Please note, however, that although you can inform an official that you are doing nonpartisan voter registration drives, you may not in any way discuss how we do it, get suggestions from the official as to how you should do it, or otherwise coordinate the activity with any elected official or his/her representative.



## INSTRUCTOR NOTE

After going through the chart once, pointing out the appropriate questions, go through it again quickly using a campaign from your own experience as a model.

## THIS IS ESSENTIAL FOR THE GROUP TO REALLY UNDERSTAND HOW TO USE THE CHART!

Make sure that your example is on the right scale for the group. Don't tell a group with a very local issue, the details of how you won the fight for some large national issue. Indicate actual goals, organizational considerations, constituency, who the decision-makers were, why they were chosen and tactics that were used. If you have clippings from the campaign, make a packet and pass it around for all to see.

After presenting your chart, add a timeline. Talk here about how a campaign needs to fit into the organization's calendar. Holidays, seasons (weather), the school calendar, elections, all have to be factored in.



## INSTRUCTOR NOTE

**On the pages that follow are directions for a Strategy Exercise.**

There are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be the most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

## Strategy Exercise

**Local**

### THE CAMPAIGN TO RESTORE BUS SERVICE TO ST. FINBAR MAGNET SCHOOLS

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving a local school district.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

St. Finbar is a fictitious city in the U.S. The school system, including charter schools, serves 135,000 students distributed between 119 elementary schools, 24 middle schools and 30 high schools. The annual school budget is \$1.2 billion, which was inadequate before the economic downturn and has typically become less adequate as costs have risen. At the same time income from taxes has declined. The students are majority non-White. Latinos make up 44% of the student population, followed by non-Hispanic White students at 25%, African Americans at 13% and the remaining 15% are largely Asian.

#### THE PROBLEM

The school board has announced, in a moment of ill-advised budgeting frenzy that to save \$10 million dollars, school bus service for all 25 magnet schools will be eliminated starting in September. The board's vote was unanimous. It is now February. The absence of bus service will be a major blow to your school as 57% of the students now ride the bus and many families can't afford to bring their children to school by other means.

The school board, which has final decision-making power over the budget, consists of five members who are elected to four-year terms on a staggered basis. The at-large school board election takes place at the same time as the City Council election. While almost 800,000 (54%) voted in the last City Council election, only 500,000 of those voted in the school board race (lower down on the ballot).

## YOUR ORGANIZATION

You are members of the PTA at the Linguistic Institute, an elementary magnet school devoted to graduating truly bilingual students. Your school has over 800 students. Slightly more than half of them qualify for free or reduced-cost lunches, indicating that the school has diversity of income as well as race. The Institute is known as a 100% magnet, meaning that none of the students attend because it is their local school. All are in the magnet program.

Your PTA has four officers and five board members plus a class parent in each class. Usually not more than 30 people show up for PTA meetings but since the bus cuts were announced, more than 100 people, have been coming.

## THE SCHOOL BOARD

Name	Notes
Hubert Gonzalez  Won Last Election By 72%  Running in Next Election: Yes	Mr. Gonzalez has a background as a community organizer, working to revitalize low-income neighborhoods and creating networks for parents of pre-school aged children. He served five years as president of the Relational Organizing Institute and has also worked for the Local Efforts Support Corporation, the Vomer science and Education Foundation, and as a consultant for the Washington Heights Community Development Corporation. In the field of labor relations, he has served as St. Finbar regional organizer for both the United Domestic Workers and United Healthcare Workers. Mr. Gonzalez serves as a board member of the St. Finbar Cooperative Charter School.
Jack Gotham  Won Last Election by 54%  Running in Next Election: No	Jack Gotham, Ph.D., was elected to the Board in 2008. He earned a Bachelor of Arts in Psychology at Sitzler College and a Masters in Psychology and Ph.D. in Clinical Psychology at U.S. National University.  Once in St. Finbar, Dr. Gotham taught Spanish at a language institute where he later became director. Dr. Gotham is currently a clinical psychologist in private practice, working with children, adolescents and adults. As a parent, Dr. Gotham has been a member of the Larson Elementary School Site Council, a classroom and PTA volunteer at Sprack Elementary. He and his wife live in Multiversity City, a subdivision of St. Finbar. Their three grown children all attended St. Finbar Unified schools.

Name	Notes
<p>Eldridge Knowles</p> <p>Won Last Election By 59%.</p> <p>Running in Next Election: Yes</p>	<p>Eldridge Knowles was first elected directly from the classroom to the board to represent District C in 1990. He served as board president and vice-president during his first term. Reelected in 1994, 1998, 2002, and 2006, he has been an active delegate to both the St. Finbar County School Boards Association and the State School Boards Association. On the national level, Mr. Knowles has served as the board's representative on the Council of Great City Schools. Mr. Knowles attended St. Finbar City Schools in Point Loma and he received his bachelor's and master's degrees in business from St. Finbar State University. He has taught for more than 36 years. He also served as a counselor, resource teacher, and curriculum administrator, and he taught business at St. Finbar City College for 10 years.</p>
<p>Carol Johnson</p> <p>Won Last Election By: 80%</p> <p>Running in Next Election: No</p>	<p>Carol Johnson was elected to the Board of Education in November 2004 and re-elected to her seat in November 2008.</p> <p>Ms. Johnson was born and raised in Smithfield, North Carolina, and graduated from Smithfield-Selma Senior High School. After graduation, she joined the U.S. Navy and served for 21 years. During her career in the Navy she rose to the rank of Senior Chief, and managed Navy Health clinics. During her military career, Ms. Johnson earned a Bachelor of Health Science from George Washington University. After her retirement from active duty in 1995, Ms. Johnson moved to St. Finbar to begin her second career in public education. From 1995 to 2003, Ms. Johnson taught at Bay Park Elementary School and served on various school and neighborhood committees.</p>
<p>Linda Nagashima</p> <p>Won Last Election By: 60%</p> <p>Running in Next Election: Yes</p>	<p>Linda Nagashima was elected to the board in 2002 and 2006. She holds a bachelor's degree in linguistics and english literature, as well as a certificate in applied linguistics for teaching English as a second language. She received her law degree from the University of St. Finbar, where she worked as a member of the administration. She served as vice-chair of the Union of Pan Asian Communities, as well as serving on boards of other community organizations. She and her husband, Kotaro Nagashima, have two sons, one who attends school in the St. Finbar Unified School District. They have lived in the city for 25 years.</p>

## Strategy Exercise

**Local**

### ASSIGNMENT



#### TIME

**Total: 30 minutes**

From the above list of elected officials, choose one to be the initial decision-maker whose support you will first attempt to win and whom you think can persuade others to get on board. Be prepared to justify your choice. Make a strategy chart on easel paper, one column to a sheet. The chart should show how you intend to put pressure on the decision maker you have chosen. When you are finished with the Tactics column, number the tactics in the order in which you will use them. Choose someone to report to the whole group.

You can make up any additional information you need as long as it is both possible and probable.



## Strategy Exercise

State

### THE CAMPAIGN TO INVEST IN NEW LEIF'S CHILDREN

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the state legislature.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

New Leif is a mythical state in the United States named after the Norse explorer Leif Erickson. Like most states, it has been hit hard by the current recession. Over the last three years, the state legislature has repeatedly cut the education budget. It is January and the legislature has proposed cutting \$2 billion more from the state budget. The legislature will be voting on the cuts in April.

All 59 school districts in the state have been affected by the cuts, which have reached directly into the classroom (e.g., cuts in staffing including teachers, teacher's aides, and hall monitors; enrichment programs including music, art, field trips, etc; transportation; health and nutrition programs; summer and after school programs).

Currently, New Leif is near the bottom of the ladder in funding education and children's services. The New Leif state PTA is concerned that further cuts will continue to erode the already lean budget for education. The failure of the legislature to act on a longterm solution to identify a stable source of funding for education will continue the downward spiral, making it even more difficult to recover lost ground.

At its last convention, the New Leif state PTA voted to develop a statewide campaign to "Invest in New Leif's Children" and stop the cuts to this year's budget. The PTA is also calling for the legislature to develop a plan for a long-term solution to education funding. The PTA has assumed a leadership role in coordinating the campaign. They have succeeded in getting the New Leif Education Association (the teachers' union) and the State School Board Association to join the campaign and are working on getting more organizations to join. While all PTA units have been asked to pressure their legislators, the state PTA has done an analysis of the Legislature and targeted some key districts where more intense pressure will be necessary.

The NLPTA knows that to be successful it must demonstrate and unleash the power of their grassroots membership and organize others to participate in the campaign. They want to use this campaign to build the organization and develop a model advocacy infrastructure that can be used for other issues. In so doing, they also want to increase the power and membership of the PTA so that they are a force to be reckoned with the state.

This week, your PTA County Council told you that your State Senator, Olivia Rosten, is a key target. Your unit is in the Freemont School District, which lies in Assembly District 13. The Freemont School District has 10 K-6 elementary schools and three junior high schools. You have been asked to take the lead in coordinating the campaign in Assembly District 13.

## STATE SENATOR OLIVIA ROSTEN

Your immediate task is to plan a campaign to get Republican Senator Olivia Rosten to oppose the state budget cuts. Sen. Rosten is a career politician. She was elected to the Assembly in 1990 and was reelected thereafter until she resigned to run for the State Senate in 1998. She has been reelected every term since then. Her committee assignments include: budget, human services and aging, health & education, utilities, and military and veterans affairs. She has a B.A. in anthropology from the state university, has six grandchildren, and once worked as the director of community services for a local hospital.

## RESULTS OF OLIVIA ROSTEN'S LAST ELECTION:

Republican Incumbent Rosten .....	28,434
Democratic Candidate .....	24,044
Libertarian Candidate .....	816

Senators serve staggered four-year terms. Half of the Senate is up for election every two years. Assembly members serve two-year terms and the whole assembly is up for election each time. Sen. Rosten had no primary opposition in the last election. She is up for reelection this year.

## THE FIFTH DISTRICT

Sen. Rosten's Fifth District takes in a portion of the state's largest city. The district then goes straight south to include parts of two wealthy suburban counties. The Senate district includes all parts of three assembly districts —the 13th, 14th, and 15th. Freemont School District lies in Assembly District 13.

District #	Population	White	Black	Asian	American Indian	Hawaiian Pacific	Latino	Other
SD- 5	143,690	102,229	32,555	3,051	1,010	78	4,088	291
AD-13	49,241	25,668	19,863	1,349	332	27	1,568	147
AD-14	47,275	38,939	6,105	1,104	191	34	813	68
AD-15	47,174	37,622	6,587	598	487	17	1,707	76

Voting Figures for the State Assembly races in Senate District 5:

- # 13 Incumbent Dem = 20,080. Unopposed.
- # 14 Incumbent Rep = 20,268. Unopposed.
- # 15 Incumbent Dem = 15,489. Libertarian = 2,174. (No Republican ran.)

In an initial discussion with your county Council staff, Sen. Rosten said that she was inclined to support the cuts as the state "... just has no more money"! Sen. Rosten went on to say that she respects the PTA and cares deeply about all children, but has a responsibility to see that the state has a balanced budget. She also said that she has been hearing from many people in her district that taxes are way out of control and they want tax cuts.

## ASSIGNMENT

### TIME

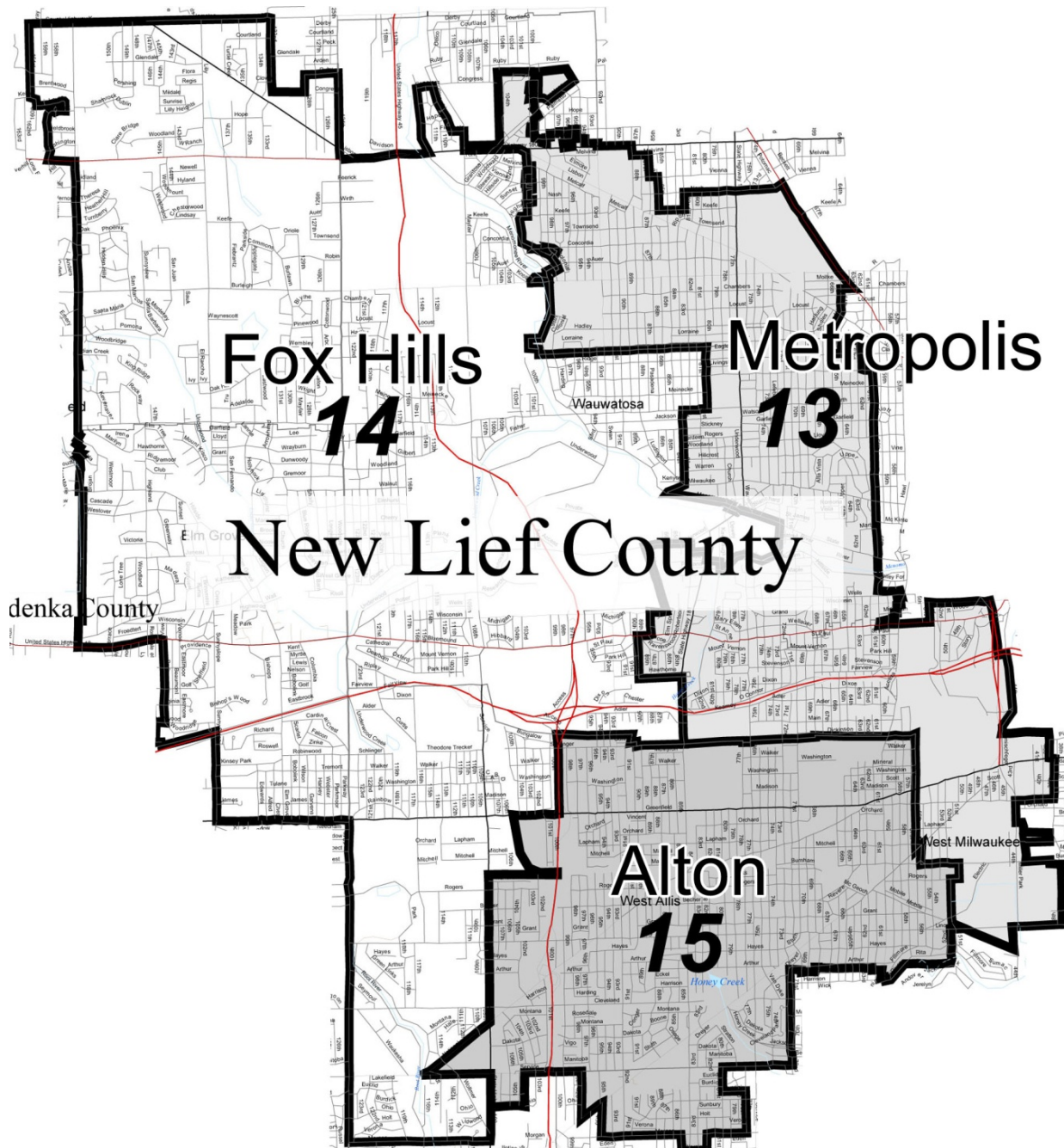
**Total: 20 minutes**

Make a strategy chart for a campaign to get Sen. Rosten to agree to vote against the budget cuts. Choose one person to present the chart to the whole group. You can make up any information you need as long as it is realistic and probable. For your Organizational Considerations column, make an educated guess about the actual budget, staffing, desired outcomes and internal problems of the campaign based on the situation in your own state/district. Consider resources that are available to you from all levels of the PTA.

Choose someone to lead your group through the chart. Write the chart on easel paper with one column on each sheet. The chart should be presented by the person who wrote it. (It is easier for the presenter to read his/her own handwriting.)

## New Lief —Senate District 5

Assembly Districts: Metropolis — 13, Fox Hills — 14, Alton — 15



## Strategy Exercise

## Federal

### THE CAMPAIGN TO IMPROVE FOODS SOLD OUTSIDE SCHOOL MEAL PROGRAMS

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the U.S. Congress.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Nutrition standards for foods sold outside school meal programs but in schools (competitive foods) have not been updated since 1979. Such foods include those sold in vending machines, cafeteria a la carte menus, and school stores. The only nutritional criteria for school foods sold outside of meals are that “foods of minimal nutritional value” (FMNV) may not be sold in the food service area during meal times.

This year, the U.S. House Committee on Education and Labor has introduced the Child Nutrition Reauthorization Act (H.R. 789). This bill, reauthorized every five years, has jurisdiction over school meal programs. In the past, Congress has considered nutrition standards for competitive foods, but has not put them into law. Members from both parties have supported and opposed these standards.

National PTA, representing the wishes of its members, has asked Congress to amend the Child Nutrition Reauthorization Act to include a minimum federal protective nutrition standard for foods sold outside of school meals. National PTA public policy staff has done an analysis to determine which members of Congress need to be targeted to pass the amendment and the final bill.

#### REP. ETHAN CHARLES

(D, New Leif- CD 2)

In 1997 Rep. Ethan Charles (a purely fictional Congressman from the equally fictional state of New Leif) was appointed Assistant State's Attorney in the county and served until 2001. Active in the Young Democrats, he was elected to the American Council of Young Political Leaders' delegation to Taiwan. In 2003, at the age of 34, he was the elected State's Attorney (youngest) for the county. He was on the Governor's transition team.



Elected to his first term in Congress in 2008, Charles has tended to vote more with the “moderates” believing that his margin of victory came from conservatives and independents. He voted against the House health care bill on the grounds that it is too big and too costly — a view that some of his constituents share.

Rep. Charles is a member of the House Committee on Education & Labor. Two members of the State PTA recently met with Rep. Charles. He told them that while he was concerned about the health of children, he thought that the PTA was going a bit overboard. “Kids will be kids” he said, “... and they will buy junk food anyway – that’s what kids do. At least when they buy it from school vending machines, a percentage of the sales goes to support school sports programs.” National PTA public policy staff has determined that Rep. Charles’ vote for the amendment in committee is essential to its passage. He could be the deciding vote! In addition, they think getting his support will also help in getting other members on board.

In a conference call with state presidents, National PTA public policy staff have laid out the strategy to pass the Child Nutrition Reauthorization Act. Your state president in turn has called your County Council to ask that you develop a campaign to get Rep. Charles to vote for the amendment, as well as the final bill. The vote is expected to take place in three months. During his campaign, Charles supported the concept of “Healthy Schools”. He now says that he is getting a lot of pressure from conservatives and libertarians in his district to oppose any federal legislation that preempts state and local control of nutrition standards.

Rep. Charles’ district is just outside a major metropolitan area. It touches the city and takes in suburbs and tourist regions. It then extends into rural areas (with some small farms) until it reaches the city of Wellsboro, the regional center of food production and processing (including snack foods) and the Super Cola bottling plant.

The PTA County Council has assigned one staff person to work half-time on this issue. In addition, there are two interns from a local community college in the district, who are available three afternoons a week. Besides salaries and travel expenses, the Council has only \$1000 for work in the Charles district. Any more will have to be raised.

The district is considered 64% urban. In this district, 13% of the population is over the age of 65 which is about the national average. By actual count that comes to 89,000 people. An additional 59,000 people are between the ages of 55 and 65. The largest minority group in this district is African-American (9%). Other groups total only 2%. The median family income in the district is \$52,000 a year, which is about ten thousand over the national average.

In the four elections prior to 2008, this district went Republican, and was considered a safe seat for Millard Gilpeak although there was always the possibility of a primary challenge from the right wing of the party. This occurred in the 2008 primary and Gilpeak was ousted by a conservative Republican. Once off the Republican ticket, Gilpeak endorsed the Democrat, Charles, who won by a very narrow margin. Gilpeak's voting record on social issues showed him split between liberal and conservative positions. In fact, his National Journal rating was 56% liberal and 44% conservative on social issues and about the reverse on economic issues. He was endorsed by the Sierra Club and League of Conservation Voters. He supported gun control, equalization of school funding, and DC statehood. He recently voted for the minimum wage increase but against card check recognition to help union organizing.

## REP. CHARLES' POSITIONS

- On federal budget issues, he is a deficit hawk. He supports adding a balanced budget amendment to the Constitution and strict spending caps for Congress.
- Unlike his Republican predecessor, he opposes gun control.
- He is for strict enforcement of immigration laws.
- During this first term, he voted for the stimulus package, and the Clean Energy Bill.



## DISTRICT VOTING DATA

The actual voting data shows some potentially useful patterns.

Total Vote in 2000	Gilpeak (R)	Rosterman (D)
	165,293 64%	91,022 35%
	<b>Bush</b>	<b>Gore</b>
	160,402 57%	111,807 40%
Total Vote in 2002	Gilpeak (R)	Fishbine (D)
	245,149 76%	77,872 24%
Total Vote in 2004	Gilpeak (R)	Schwartz (D)
	245,149 76%	77,872 24%
	<b>Bush</b>	<b>Kerry</b>
	213,144 62%	124,163 36%
Total Vote in 2006	Gilpeak (R)	Gronoffski (D)
	185,353 69%	83,817 31%
Total Vote in 2008	Marris (R)	Charles (D)
	173,478 48.4%	176,052 49.1%
	<b>Bixbe (Libertarian)</b>	
	9,190 2.5%	
	<b>McCain (R)</b>	<b>Obama (D)</b>
	216,896 59%	148,029 40%

### Voter Registration and Turnout in Charles's District

	Registered 2008	Voted in 2008	Percent Voted 2008
<b>Republicans</b>	193,584	161,330	83%
<b>Democrats</b>	200,216	160,753	80%
<b>Unaffiliated</b>	71,443	50,310	74%
<b>Libertarian</b>	1,141	784	69%

There are parts of 12 counties in this district. Of those, Obama carried only two, the second largest county and the smallest. Charles carried in seven counties of the ten that also went for McCain.

## POSSIBLE OPPOSING ORGANIZATIONS

Voter Registration and Turnout in Charles's District

Name	Notes
National School Board Association (NSBA)	NSBA supports state and local control of nutrition standards, but does not support federal regulations.
Snack Food Association	The Snack Food Association supports the snack food industry and represents snack manufacturers and suppliers. They are wary of federal restrictive nutrition standards and have concerns that their products won't meet these standards. If federal standards were passed, they prefer these standards to preempt state standards so that their products don't have to meet both state and federal standards.

## ASSIGNMENT



### TIME

**20 Minutes**

From the point of view of the *Campaign to Improve Foods Sold Outside School Meal Programs*, prepare a strategy chart showing how you would set up a campaign to get Congressman Charles to vote "Yes" on the amendment to the Child Nutrition Reauthorization Act. Put the chart on easel paper one column to a sheet. Add a four-month time line. Choose someone to present it to the whole group. If you need additional information you may pretend you did the research and make it up. Just keep it within the realm of the possible and plausible.

# HANDOUTS

# MIDWEST ACADEMY STRATEGY CHART

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities. Develop a timeline.

GOALS	ORGANIZATIONAL CONSIDERATIONS	CONSTITUENTS, Allies & Opponents	TARGETS (Decision Makers)	TACTICS
<p><b>Goals are what we want to WIN!</b></p> <ol style="list-style-type: none"> <li>List the long-term goals of your campaign.</li> <li>State the intermediate goals for this issue campaign. What constitutes victory?</li> </ol> <p><b>How will the campaign:</b></p> <ul style="list-style-type: none"> <li>Win concrete improvements in people's lives?</li> <li>Give people a sense of their own power?</li> <li>Alter the relations of power?</li> </ul> <ol style="list-style-type: none"> <li>What short-term or partial victories can you win as steps toward your long-term goal?</li> </ol>	<ol style="list-style-type: none"> <li>List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, canvass, etc.</li> </ol> <p><b>What is the budget, including in-kind contributions, for this campaign?</b></p> <ol style="list-style-type: none"> <li>List the specific things you need to do to develop the campaign and ways in which the campaign will strengthen your organization. Fill in numbers for each.</li> </ol> <ul style="list-style-type: none"> <li>Expand leadership group</li> <li>Increase experience of existing leadership</li> <li>Build membership base</li> <li>Expand into new constituencies</li> <li>Develop Issue Campaign Message</li> <li>Develop Media Plan</li> <li>Develop a Fundraising plan – how can you raise money for and through this campaign?</li> </ul> <ol style="list-style-type: none"> <li>List the internal (organizational) problems, that must be considered if the campaign is to succeed.</li> </ol>	<ol style="list-style-type: none"> <li>Who cares about this issue enough to join or help the organization? <ul style="list-style-type: none"> <li>Whose problem is it?</li> <li>Into what groups are they already organized?</li> <li>What do they gain if they win?</li> <li>What risks are they taking?</li> <li>What power do they have over the target?</li> </ul> </li> <li>Who are your opponents? <ul style="list-style-type: none"> <li>What will your victory cost them?</li> <li>What will they do/spend to oppose you?</li> <li>How strong are they?</li> <li>What power do they have over the target?</li> </ul> </li> </ol>	<p><b>1. Primary Targets</b></p> <p>A target is always a person. It is never an institution or an elected body. There can be more than one target but each need a separate strategy chart as your relationships of power differs with each target.</p> <ul style="list-style-type: none"> <li>Who has the power to give you what you want?</li> <li>What power do you have over them?</li> </ul> <p><b>2. Secondary Targets</b> (You don't always have or need secondary targets)</p> <ul style="list-style-type: none"> <li>Who has power over the people with the power to give you what you want?</li> <li>What power do you have over them (the secondary target)?</li> </ul>	<ol style="list-style-type: none"> <li>For each target, list tactics that each constituent group can best use to put pressure on the target to win your intermediate and/or short-term goals.</li> </ol> <p><b>Tactics must be:</b></p> <ul style="list-style-type: none"> <li>In context</li> <li>Directed at a specific target</li> <li>Backed up by a specific form of power</li> <li>Flexible and creative</li> <li>Make sense to members</li> </ul> <p><b>Tactics include:</b></p> <ul style="list-style-type: none"> <li>Phone, email, petitions, LTE, OP ED,</li> <li>Media events</li> <li>Actions for information</li> <li>Public Hearings</li> <li>Non-Partisan Voter Registration and Education</li> <li>Non-Partisan GOTV</li> <li>Accountability Sessions</li> <li>Negotiations</li> <li>Elections</li> <li>Law Suits</li> <li>Strikes</li> </ul>

# ***MIDWEST ACADEMY STRATEGY CHART***

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities

<b>GOALS</b>	<b>ORGANIZATIONAL CONSIDERATIONS</b>	<b>CONSTITUENTS, Allies &amp; Opponents</b>	<b>TARGET(S)</b>	<b>TACTICS</b>

## Module 3: Coalition



### GOALS

By the end of this module, participants should be able to understand:

- That coalition building is actually harder than building a single organization.
- Organizational self-interest.
- Specific guidelines for success and how to analyze potential allies.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

Coalition building is often one of the most frustrating parts of organizing. The problem is made more difficult because organizers expect coalition building to be easy and don't give it the special attention it deserves. The more coalition experience the group has, the more discussion there will be.



### MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



### HANDOUTS

- PowerPoint Printout
- Coalitions Exercise (Federal, State or Local from Exercise Kit)



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 3: COALITIONS — BUILDING AND JOINING



#### SAY

By the end of this module, you should understand the following concepts:

- Building a coalition is actually harder than building a single organization.
- Organizational self-interest.
- Specific guidelines for success and how to analyze potential allies.

### COALITIONS DEFINED

Let's start with a definition of coalitions. When we use the word coalition we mean:  
An organization of organizations that is actively working on an issue campaign.

A coalition is not:

- An organization of individuals who are different from each other.
- An organization of individuals who happen to belong to other organizations as well.

Many groups that call themselves coalitions aren't coalitions. In Grassroots Organizing when we use the word coalition, we mean an organization of organizations. In real life, most coalitions are a mixture of individuals, representatives from organizations and people who happen to belong to organizations but who weren't sent to the coalition by their group. The main difficulty with coalitions of this type is that the people in them have different needs.

*Example:*

*Every organization knows that it must get some public recognition for its work if it is to recruit members, develop a base, and keep its funding. Individuals who are not faced with the problem of maintaining an organization often don't understand this and consider the organizational representatives to be "power hungry" or "domineering." In a coalition where everyone is a formal organizational representative, they might be more competitive, but they at least understand each other's motives.*

There are three basic types of relations between organizations, all of which are often referred to as coalitions. It helps to sort them out.

- **Formal Coalitions** — Coalitions exist when groups enter into a formal agreement to work together toward a specific, long-term objective. Some coalitions are permanent or are expected to last for many years.
- **Issue Campaigns** — Groups that get together for an ongoing effort; for example, to pass specific legislation. It is often more useful to say “campaign” rather than “coalition,” when the expectation is that a campaign will go out of existence when the issue is over and not live on to compete with its own members. The key understanding in a legislative campaign is to agree on not only what will go into the bill, but what is the least that the coalition will accept.
- **Informal Coalitions** — Groups work together from time to time, often on a specific event, but without formal agreement or rules.

Building a coalition is one of the hardest parts of organizing. The hard part isn't getting groups to join, but getting the coalition to work and keeping the groups in it. Often we expect a coalition to function the way a group of friends does, but this is seldom the case. Organizations in a coalition have institutional needs and self-interests that are different from the needs of individual people.

- To make coalitions work, we must identify these institutional needs and work to meet them.
- The job is sometimes complicated because the people who represent groups in a coalition may not be experienced enough to articulate their institutional needs. They just know that something isn't going well, and they feel that their organization is getting weaker instead of stronger.

## ADVANTAGES AND DISADVANTAGES OF COALITIONS



### ASK

What has been your experience working in coalitions?

Possible responses:

- We got sidetracked from our own program.
- Others didn't do their share.
- Too many compromises required.
- Problems with who got credit.
- We felt ripped off.
- The activities were dull.
- Too many meetings.



### SAY

It sounds like you have had some very interesting experiences. And not all positive. Let's talk about them. What have been some of the disadvantages of working in coalitions?



## INSTRUCTOR NOTE

Make a mental note of who responds. If a lot of people raise hands, there will be much discussion. You need to watch the time here and limit discussion if necessary. If there are a lot of negative comments and bad experiences, start with the disadvantages.

Below are examples of negative experiences:

- We got sidetracked from our own program.
- Others didn't do their share.
- Too many compromises required.
- Problems with who got credit.
- We felt ripped off.
- The activities were dull.
- Too many meetings.

Again, get the story right. You will refer back to these comments when you give the coalition guidelines. For example, "Now Michelle might not have had the problem she mentioned if her local PTA had chosen a unifying issue..." Get five or six comments. Don't spend a lot of time on this.



## ASK

So, if working as a coalition is so hard, why do it? What are some of the advantages of working in coalition?



## DISPLAY ON A FLIPCHART OR POWERPOINT:

Write down some of the advantages. Again, don't spend a lot of time (just get some advantages written down). Below are examples of advantages if no one says them:

- Able to win something that couldn't be won alone.
- Increases power.
- Increases resources (staff, money, members).
- Broadens the scope of our work.
- Able to get better/more media coverage.

## GUIDELINES FOR COALITION BUILDING

As you go through these guidelines, relate them to the problems you just listed from members' experiences. List them on easel paper or PowerPoint.



### SAY

So, your PTA council knows what the problem is and what the issue is. It also knows that there are other organizations that are concerned. In order to increase your power and resources, and to win something you couldn't win alone, you decide to build a coalition. Here are tried and true guidelines for successful coalition building.

#### 1. Choose Unifying Issues.

Avoid shopping lists. When coalitions form to work on a specific issue, it is a relatively easy structure to organize, because those who aren't interested just don't join.

- When an organization is a permanent ongoing coalition that moves from issue to issue, then the choice of issue needs to be made more carefully. This is the key. The issue needs to be one that is important to all groups in the coalition. It should not be the main issue of any one group. This avoids having some groups feel that they are being co-opted to work on someone else's issue.
- Avoid coalitions based on groups agreeing to exchange help, "We'll help you fight the utility rate increase if you help us win funding for an after school program." Organizations can rarely deliver their members to work on some other group's program, and no group feels that it gets enough out of the coalition. Coalitions in which groups put their issues on the table and try to work on all of them are called shopping list coalitions.

#### 2. Coalitions are Rarely the Road to Diversity.

Don't create coalitions in the hope of bringing greater diversity to your efforts. Diversity will only be achieved if the coalition partners are really interested in similar issues and need each other in order to win.

#### 3. Avoid Contorting your Program to Suit Some Other Group.

Likewise, don't expect them to change their program just so that everyone can be friends.

#### 4. Understand and Respect Each Group's Self-Interest.

Every organization needs to:

- Gain new members.
- Raise money.
- Be seen as powerful by administrators or politicians.
- Get publicity.
- Build relationships with other groups.
- Provide an exciting activity for its members.
- Build internal morale.
- Have a public role for its leaders.

These are good things to do. Experienced leaders can use a coalition to achieve them. Inexperienced leaders neglect them and their groups dwindle. The coalition should help its members accomplish these things.

## **5. Respect the Group's Internal Process.**

Every group has its own way of making decisions. Don't rush them. If you don't like the answer from the group's chair, don't go around the chair to someone else in the leadership.

- Don't get involved in another group's factionalism or worse, cause it.
- Don't use the work of the coalition to draw the members of another group into your own group.

## **6. Agree to Disagree.**

Not everyone has to agree on everything. The coalition can only function within the areas of agreement.

## **7. Play to the Center With Tactics.**

All groups should be comfortable with the tactics. There are sometimes advantages to encouraging the more confrontational groups to go off and do their thing independently. However, it should be part of the overall strategy.

## **8. Recognize that Contributions Vary.**

Some groups are better at conducting research; others can turn out a large number of people, or may have good community contacts.

A coalition should have a budget, even if everything is contributed. Put down the cash value of contributed items. This allows the member groups to better understand the importance of their respective contributions.

## **9. Structure Decision-Making Carefully.**

One group, one vote. This method only works if the groups are of equal strength. The small groups should not be able to out-vote the large just because there are more of small groups. Individuals should not be able to out-vote organizations. It is often better to recognize that in some coalitions, everyone is not equal. The program won't work if the strongest groups don't support it, and it is acceptable for marginal organizations and individuals to stay out of a particular activity in which they don't feel comfortable participating.

When faced with these problems, many groups turn to consensus decision-making, in which everyone has to agree on everything. This is fine if you can do it, but recognize that it excludes people who can't spend long hours at meetings. The decision-making process is often smoother when the coalition is composed strictly of organizations that can make more or less the same level of contribution to the work. The decision-making process should be clear from the outset. So should the ground rules.

There is no such thing as the "democratic right" to join a coalition. You can allow in, and keep out, whichever groups you wish, including sectarians and disrupters. Don't be guilt tripped.

## 10. Urge Stable and Senior Representation at Meetings.

The same people should represent a group at each coalition meeting, and they should have the power to commit the group to, or approve, the coalition program. Otherwise, the coalition can't move without long delays.

## 11. Distribute Credit Fairly.

The coalition itself needs to get the larger share of publicity or credit. Otherwise the whole isn't greater than the sum of the parts.

Try to distribute the remainder of the credit, media attention or spokesperson positions among the individual members fairly, but with an eye to the contribution that each makes.

## 12. If There is Staff, It Should be Neutral.

Problems develop when the staff is contributed by one member organization of a coalition. If there is staff, they should be people with no other loyalties, whose main job is to build the coalition as a whole. For coalitions that do not have paid staff, this also applies to leadership and facilitation roles.



### INSTRUCTOR NOTE

Ask for discussion as time allows.

## GUIDELINES FOR JOINING COALITIONS



### SAY

Suppose another organization approaches you, as the leader of your PTA unit, to join a coalition. There are several things that your group must first assess before agreeing to join. Here are some guidelines for joining and participating in coalitions.



### DISPLAY ON A FLIPCHART OR POWERPOINT:

#### Guidelines for joining coalitions:

1. Know what you want to get out of it.
2. Know who is behind the coalition.
3. Maintain an independent program.
4. Evaluate your role carefully.



### SAY

#### 1. Know What You Want To Get Out of It.

Of course you want to win on the issue, but you are also building the PTA. How will participation in the coalition help you do that? Will it:

- Expose you to more potential members?
- Allow you to win more significant victories?
- Share the burden of organizing large activities?
- Get you publicity?



## *Example*

*A student association at a large state university was fighting cuts to the state education budget. Another statewide organization was fighting tax cuts for corporations that were forcing cuts to the state public programs budget. Naturally, the groups were interested in working together when they found out about each other's campaigns. Before joining a coalition, however, the student group set the following conditions:*

- *Opposition to education budget cuts had to be a major demand of the new coalition.*
- *Other students on the campus who wanted to get involved in the coalition would be told to join through the association.*
- *The student association's leaders would be frequently used as spokespeople for the whole coalition.*
- *A major coalition turnout event, a speakout on the state budget, would be held in an auditorium on campus.*

Did this arrangement strengthen the student association? Of course it did, but it also strengthened the whole coalition. The speakout drew more than 900 people, and half of them came as a direct result of the student group's efforts.

## **2. Know Who is Behind the Coalition.**

- Who is funding it?
- What are you expected to contribute?

## **3. Maintain an Independent Program.**

A group that is only strong enough to do one thing at a time shouldn't join a coalition. If you have no program outside the coalition, you won't develop your own identity or membership. It may not seem to matter, but where the coalition goes; your group will go with it. Use the three-fourths rule: three-quarters of your energy and resources should go into your own organization.

## **4. Evaluate your Role Carefully.**

Is it really necessary for the leaders of your group to play a large role in the leadership and decision-making of the coalition, or is it enough to get your members to show up for occasional coalition activities?

The coalition can absorb all of your time and energy just as easily as your own organization can. If three-quarters of your effort doesn't go into building your own group, your members will be drawn into the activities of the coalition or be recruited away by other groups.



## **INSTRUCTOR NOTE**

Discussion as time allows.



## INSTRUCTOR NOTE

**On the pages that follow are directions for a Coalition Exercise.**

There are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be the most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

## Coalition Exercise

**Local**

### FORMING THE ST. FINBAR EDUCATION COALITION

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a local issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to get the bus service restored to all magnet schools in the district the Linguistic Institute PTA has decided that it must involve other organizations to build enough power to be successful. School Board Member Hubert Gonzalez has agreed to introduce the proposal. You are the leaders of the PTA, and have decided to form the St. Finbar Education Coalition. You are considering asking the following groups to join:

- The Greater St. Finbar Small Business and Manufacturers Association
- St. Finbar chapter of the State Senior Citizen Federation
- St. Finbar Interfaith Committee
- The St. Finbar branch of the NAACP

## Coalition Exercise

**Local**

### ASSIGNMENT



#### TIME

**Total: 20 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed St. Finbar Education Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the St. Finbar Education Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the Linguistics Institute PTA.

## Coalition Exercise

State

### FREMONT PTAS ORGANIZE A COALITION

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a statewide issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to stop the \$2 billion in cuts to the state budget, the New Leif PTA has asked PTA units that have not received a commitment from their state senator to vote against the cuts to invite other organizations into the campaign to increase their power. A few members from PTAs in Fremont met with Sen. Rosten and asked her to vote against the cuts. Sen. Rosten says that she is getting a lot of pressure from some of her constituents to vote for the cuts. Several of the Fremont PTAs have decided that to win they must form a coalition. In addition to recruiting all the PTAs in the area, you are considering asking the following groups to join the coalition:

- The Fremont Retail Merchant Association
- The Fremont chapter of the State Senior Citizen Federation
- The Fremont Interfaith Committee
- The Fremont branch of the NAACP

## Coalition Exercise

**State**

### ASSIGNMENT



#### TIME

**Total: 20 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the Fremont PTAs.



## Coalition Exercise

## Federal

### REAUTHORIZATION OF THE CHILDHOOD NUTRITION ACT

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a federal issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to pass the Reauthorization of the Childhood Nutrition Act, the National PTA has asked your county council to get Congressman Ethan Charles to vote “YES” on an amendment to include a minimum federal protective nutrition standard for foods sold outside of school meals. PTA leaders met with Rep. Charles and asked him to vote for the amendment and the reauthorization. Rep. Charles was quite friendly. He said that he totally respected the PTA and all its good work, but he thinks that trying to “regulate what is in a school vending machine is just not the role of the federal government.” Your PTA has decided that to win it must form a coalition. You are considering asking the following groups to join:

- The County Medical Association
- The Interfaith Committee
- Local 123 of the State Education Association
- The County Branch of the NAACP

## Coalition Exercise

### Federal

### ASSIGNMENT



#### TIME

**Total: 30 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the PTA County Council.

## Module 4: Media As A Tactic



### GOALS

By the end of this module, participants should be able to understand:

- How to use the media to advance an issue campaign.
- Kinds of media coverage.
- Self-interest of the media.
- Planning to use the media.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

The focus of this session is to help people think more strategically about how to use the media. The exercise will give participants practice in crafting a focused message that states a demand and conveys the real power of the organization.

Media plays a huge role in our society by helping shape public opinion. Getting media coverage can be a huge asset to raising awareness and educating members of the community about any news, stories, or programs you might be working on. A few things you will want to keep in mind when working with members of the media:

- Always read or watch their coverage before reaching out to them. It is important to know what type of stories they tend to cover and it will help you to get a sense of their reporting style.
- Reporters are busy and media resources are dwindling these days. Reporters rely more and more on public relations professionals to give them a complete story with up-to-date facts and statistics that they will not need to double-check.
- Email is your best approach unless you have a great working relationship with a particular reporter and feel comfortable picking up the phone to call directly.

As you carry out your own community-based programs, you can develop positive working relationships with print and broadcast professionals and organizations in your community.

This advocacy training module is structured to help PTA members use the media to reflect the power of the association.



## MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



## HANDOUTS

- PowerPoint Printout
- Checklist for Media Events
- Media Exercise (Federal, State or Local from Exercise Kit)



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 4: MEDIA AS A TACTIC



#### SAY

By the end of this module, you should understand:

- How to use the media to advance an issue campaign.
- Kinds of media coverage.
- Self-interest of the media.
- Planning your use of the media.
- Guidelines for using the media.

Here are some key points to keep in mind:

- Good media coverage reflects a powerful issue campaign strategy.
- In this session, we are going to discuss how to use the media to advance an issue campaign. That is, not just getting good coverage, but using the media strategically to build power.
- It is crucial to begin with a solid strategy for each issue campaign. This means that we have carefully defined what we want to win, and evaluated our own organizational power in relationship to the power of the decision-maker we are trying to persuade.

Let's say we want State Rep. Eunice Smith to vote "Yes" on increasing state school funding. By how many votes did she win the last election? How many PTA members do we have in her district? Can we mobilize them to write letters, make phone calls, and meet with her?

Our use of the media in this effort is another tactic to convey to Rep. Smith that we have organized a lot of people who want her to vote "Yes." Of course, we will mention along the way the outdated textbooks, classrooms without teachers, and overcrowded conditions. In addition to talking about the problem, it is essential to communicate who is doing the asking, that is, large numbers of PTA members with the power to vote "Yes" or "No" on the question of continuing Eunice Smith as their elected representative.

## KINDS OF MEDIA COVERAGE

### There Are Several Kinds Of Media Coverage We Can Aim For

If we hold a large rally at the offices of our local school board, we may try to get the media to cover what we are doing. However, if enough people show up to talk to the members of their school board, we may consider the event a success whether or not we get on television or in the newspapers. In this case, the media is important, but secondary to our purpose.

At other times, we may do something for the sole purpose of getting media coverage, to put pressure on the decision-makers who will be mentioned. We may release a report which shows that our state's schools receive less funding than 46 other states; we may announce that the school board president received a large campaign contribution from the contractor who is about to be hired to build a new school. In these cases, if we make the announcement, but no one from the media is there to hear, it is as if the announcement never happened. Like the proverbial tree in the forest, if it falls and no one hears, it made no noise and it did not serve the intended purpose.

A third situation occurs when the media asks us for comment for the newspaper or for a TV news program, or to participate in a radio talk show. Here, we have less control of the agenda. Sometimes we are caught by surprise and have to think on our feet. It is very important, therefore, to understand how the media thinks, what they are likely to be looking for, and exactly what we want to convey to move our agenda forward strategically, even if we only have a 15-second sound bite to do so. We need to be prepared to get our most important points across whether the media ask the right questions or not.

This brings us back to the point that our use of the media is a tactic that should fit with our larger strategy. Activities designed to garner media coverage go in the Tactics column of the strategy chart along with such other tactics as petition drives. This means that a media event has the characteristics of any other tactic.



### ASK

Who remembers from the Strategy discussion the three common characteristics of all tactics? For every tactic there must be:

- Someone who does it.
- Someone to whom it is done.
- Some reason why the person to whom it is done doesn't want it done.

Groups so often say that they have adopted a "media strategy" to win a campaign. This elevates the use of media from the level of a tactic to that of a strategy; the media becomes the whole plan. Sometimes a media strategy is possible, but it usually requires hundreds of thousands, or millions, of dollars of paid media time to accomplish. Media coverage of an event doesn't cost anything. It is covered because it is news. This is sometimes referred to as "earned media" to distinguish it from "paid media."

## SELF-INTEREST OF THE MEDIA



### SAY

How does the media choose what to cover? There are a few cities where there is so much major news happening that it's easy to get drowned out, no matter how hard you try. New York, Washington DC, and Los Angeles are examples, but there aren't many others. There are also a few places where media outlets are owned by individuals who are often ideologically opposed to some of the legislation we support, and often won't allow it to be covered.

To help ensure that we get media coverage, the first thing is to understand the self-interest of the media.

Timing and substance are everything. Reporters are pushing out stories faster than ever before as the media evolves into a much more digital-friendly landscape. A typical TV reporter is likely also writing for his/her outlet's blog. If you have a story that is timely and relevant, try to measure up your "assets" against the outlet. Do you have a ton of photos or video? It might be a great online/blog piece. Do you have a very media savvy spokesperson that can talk on camera about a newsworthy program or story?

Let the reporter know! He/she is always scanning her email for the next "hot" story. Any assets you have will help your story stand out from the rest.



### INSTRUCTOR NOTE

See more at: <http://www.ptakit.org/Communications/Working-with-the-Media/Identifying-Newsworthy-Items.aspx#sthash.gw35MSZ0.dpuf>

## PLANNING YOUR USE OF THE MEDIA



### SAY

Planning starts with the strategy chart. You have already identified the decision-maker. You are clear on what you want him or her to do, and you have looked at the electoral numbers and voter registration figures and know what your base of power is. Use of the media is another way of applying your power.

Start planning by writing a headline. Of course, the newspaper editors rarely use the headline you write, but the point of doing it is to help you focus. Ask, "if a reporter saw what we are about to do, what headline would she write?"

Once you have your headline, the whole media event should be designed to suggest that one line to the viewer. Be sure your line expresses your main demand and your power! An example might be, "State Representative Smith, 500 parents want you to vote to support our children's education!" A less useful line would be, "Kids Need Books!" because there is no power reflected, and the decision-maker is not mentioned. It would be possible to agree that kids need books and not vote for more money.



## GUIDELINES FOR USING THE MEDIA



### SAY

We have six guidelines that will help you use the media to advance your issue campaign:

1. There must be hard news.
2. Think pictures.
3. Have a quotable quote.
4. Help reporters do their work.
5. Know the media staff.
6. Include human interest.



### DISPLAY ON A FLIPCHART OR POWERPOINT

Guidelines For Using The Media:

1. There must be hard news.
2. Think pictures.
3. Have a quotable quote.
4. Help reporters do their work.
5. Know the media staff.
6. Include human interest.



### SAY

#### 1. There Must Be Hard News

Unless you are the president, a rock star, or the head of the mafia, your opinion isn't news. You can't call a media event just to say how upset you are about something. There must be news. News can be any of the following:



### DISPLAY ON A FLIPCHART OR POWERPOINT

There Must Be Hard News:

1. Large numbers of people do something interesting.
2. Someone who is news says it.
3. A new program is launched.
4. New information is revealed.
5. The unexpected happens.
6. New treatment of an old story.
7. A tie-in with a breaking story.



### SAY

#### 1. *Large numbers of people do something interesting.*

The media thinks that if a large number of people want to do it, then a larger number of people will want to read about it.

#### 2. *Someone who is news says it.*

The downside of using celebrities is that it deprives your leaders of the experience and risks your message getting sidetracked in a discussion of the latest divorce or the Academy Awards.

### ***3. A new program is launched.***

The media is often more interested in announcing a new activity than following up on an old one. For example, an organization once used its annual conference to launch a new campaign for national health care. A year later, when conference time came again, the group realized that a press release saying, "The campaign continues," wouldn't make much of a story. Instead, they announced the launching of a new campaign for national health care. They got good coverage each time. Make ongoing campaigns sound new.

### ***4. New information is revealed.***

While a story is running, you can keep it in the headlines longer by adding new information. For example, the state representative who opposes the smoking ban took big contributions from the gaming industry.

### ***5. The unexpected happens.***

"High school students demand tougher school standards."

### ***6. New treatment of an old story.***

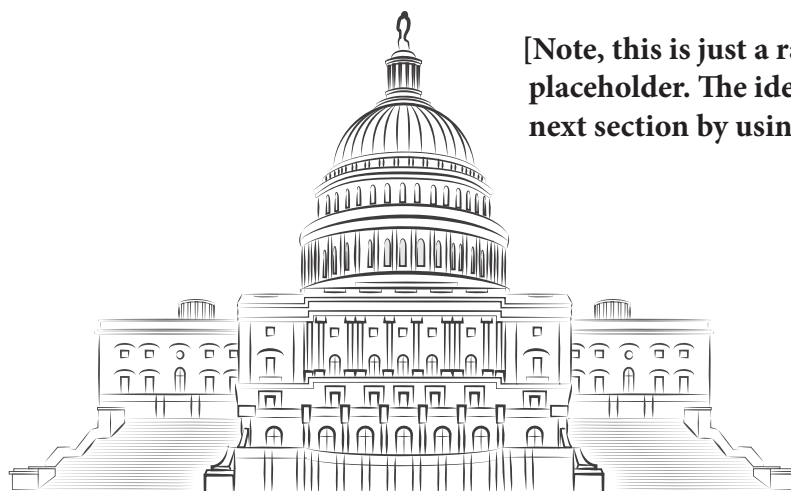
Taxes are an old story. Each year on April 15th, every TV station has a shot of people running to mail their tax returns. If, at the same time, a large number of people were mailing letters to the President of the United States asking for more tax money to support school reading programs, it would probably be picked up as well.

### ***7. A tie-in with a breaking story.***

A tie-in with a breaking story makes your event more newsworthy. Whatever is on the morning TV news is likely to be in the evening paper. If you can call the paper with a local angle on a national story they will often thank you.



## DISPLAY ON A FLIPCHART OR POWERPOINT



[Note, this is just a random image used as a placeholder. The idea is for you to illustrate the next section by using a picture of your choice.]



## SAY

### 2. Think Pictures.

Even the print media is increasingly visual in its writing. Ask yourself how this event will look. The media hates talking heads. Move the event outdoors and produce interesting visuals and exciting people. Even if a newspaper doesn't run a photo, they will describe the event in visual terms. Put a prominent sub-head in the media advisory that says, "Photo Opportunity." Then say what the opportunity is.

#### Examples:

- *Two-block-long living fence.* A group that wanted an elected official to get off the fence and take a position marched in front of his office with sections of picket fence from the garden store.
- *Popsicle sticks for the state legislature.* In order to bring attention to the need to fund school nurses, the Georgia State PTA collected and sent popsicle sticks/tongue depressors to their state legislators.
- *Giant estimated dice.* A group protesting the utility company practice of sending estimated bills instead of actually reading the meter went to the company with dice made from cardboard cartons. They rolled the dice and made "estimated payments" of their estimated bills.
- *World's largest monopoly board.* Don't play monopoly with our community. A neighborhood organization took a huge Monopoly board to city hall. The street names were from their own neighborhood. They were protesting the elimination of affordable housing and conversion to high-priced condos.
- *Utility rates balloon up.* A consumer organization protesting rising utility rates made a graph of rate increases over the last 10 years. The last bar was a long black ribbon that was taken up into the air with a helium balloon.
- *Use visuals.* Good visuals include a large sign with a slogan and a chart or graph that makes the point if statistics are involved.
- *The most important visual is the one with the name of the organization.* Put it right on the podium if you use one. An 8 x 11-inch, boldly lettered sign is better than a five-foot banner which won't fit in the picture and is hung so high that only the bottom of the letters shows. If there are resources, having a repeating logo as the backdrop is also effective, especially if you have a VIP speaker taking up your issue. People can also wear stickers with the organization's name. The visual needs to work as a still photo. It can't be an activity that takes time to unfold.



## DISPLAY ON A FLIPCHART OR POWERPOINT

### Quotable Quote:

- Captures the meaning of the event.
- Each speaker repeats it.
- Put it on signs.
- If nothing else, spell it right.



## SAY

### 3. Have A Quotable Quote.

Have a quotable quote, a consistent theme that runs throughout the event and is reflected in the visuals. Each speaker should use the same quote. For example, a campaign to get a local supermarket to carry organic food used the quote, “Let us choose safe food.”

Think of some of the all-time famous quotes. Who said:

- “We have nothing to fear but fear itself.” (Franklin Delano Roosevelt)
- “Ask not what your country can do for you, but what you can do for your country.” (John F. Kennedy)

The interesting thing about these quotes is that they aren't exactly true. We did have something to fear other than fear itself, and why not also ask what our country can do for us? But true or not, these quotes will live forever.



## DISPLAY ON A FLIPCHART OR POWERPOINT

Help Reporters:

- Write release as a news article.
- Who, what, when, where and why in first paragraph.
- Length of typical news story, or a bit longer.
- Factual, well-written and accurate.
- Put opinions in quotes.



## SAY

### 4. Help Reporters Do Their Work.

- Like everyone else, reporters are overworked and underpaid. If they can take your release and run it as their article, they are more likely to use the story than if they have to take notes and write something. Study the length and style of stories in the local paper and learn to write that way. Develop a reputation for factual, well-written material. Remember that your media event is competing with dozens, even hundreds, of other activities that people are trying to get the media to cover. The easier you make it, the more successful you will be.
- Write your press release as if it were a news article. Study the local paper and learn its style of reporting. What kind of sentence structure does it use? What education level is it written for? Try to give them copy that is as much like what they print as you can.
- Write a lead paragraph that tells who, what, when, where, why and how. This way, if the story is cut to just one paragraph you still have all the information.
- Make your release the length of the average story or a bit longer to save editing.
- Develop a reputation as a source that doesn't need a great deal of fact-checking.
- Put opinions in quotes. The reporter doesn't want to be responsible for the accuracy of what you say, only the fact that you said it. By using quotes you make it clear that it is your opinion, not the reporter's.



## SAY

### 5. Know The Staff.

Finding the right reporters is critical to getting started with building a contact list. The best way to build a list of local reporters is to first read and watch the news outlets in your market. This will help you identify which reporters are covering specific topics. For example, is there a local news reporter that you have seen cover news of school or education programs? Note his/her name and do a quick scan of the outlet's website for a phone number or email. This might take a bit of digging and time in the beginning, but you will find that building a targeted media list will be well-worth the investment.

Maintaining good relationships with these reporters will be what helps you place your story. Try to be selective about what you are taking to each reporter. Make sure you are being strategic – there is a fine line between staying on the radar and bombarding contacts with too many non-newsy updates. Reporters appreciate resources – and that means you!

Only pitch stories to them that you know they would have interest in covering. And if they do not cover your story, thank them anyway. Or perhaps point them to another resource where they can get the information they are looking for. They will remember that you helped them and that will make the difference for next time.

When you do have a relationship with reporters, remember that nothing is ever really confidential or off-the-record. If you don't want it printed, don't say it. If you don't want it on TV, don't do it. (This last point applies to every aspect of your life.)

### 6. Include Human Interest.

A study about toxic emissions is boring. A statement from a family whose child was exposed to the emissions is human interest. Every media event should have a human interest element, with real people telling their own stories. Local PTAs have many good stories that can be used to illustrate the points that we are trying to make. Just remember that each story needs to end with a demand on the decision-maker. Stories do not replace the need to show power, but they help draw attention.

## THE MEDIA ADVISORY



### SAY

To attract the media to your event, send out a Media Advisory a week ahead of time. This can be done by mail or fax. Email is also acceptable, but it is too easily lost or ignored. The advisory includes a few lines telling reporters what the event will include, but don't give them enough information that they can write a story without coming. Include information on the place and time of the event and the name of someone to contact for further information, along with a mobile phone number.

Add a heading that says, "Notice of Photo Opportunity" and tell them what visual device you will use to make the event more appealing to TV and news photographers. It might be a two-block-long living petition or five pounds of cigarette butts collected from local school yards. The visual needs to support the theme of the media event, which you have created in order to put pressure on a decision-maker. So it can't be just a clever stunt. Three dogs dressed as walnuts probably will get on TV, but if it has nothing to do with the issue, it won't be the kind of coverage you want.

Three days before the event, start calling all the media outlets and speaking to the assignment editors (TV) and city editors (print). Tell them about the event and ask if they are coming. Mention that you sent an advisory but don't expect them to remember it or even to have read it. Call again the night before the event to remind them and again the next morning to make sure. Remember that competition for the attention of the media is very stiff and there may be dozens or hundreds of events on the same day. Only two or three will get covered.

At the event, have a press release to hand out. Again, give all the contact information. Write the headline you would like to see on the story, although your headline won't be used. Then open with a lead paragraph that answers the questions: "who," "what," "when," "where," "why" and "how". "Who" is your organization, and "what" is the pressure you are putting on the decision-maker. The rest follows from that. In the second paragraph, quote a leader or volunteer. In the third, give more background. Two pages are the most for a release. If there is an accompanying report or study, attach it to the release, but don't try to incorporate it in the body of the release. The release should be able to stand on its own as a story would appear in the newspaper.

Here is an example of a media release.



### INSTRUCTOR NOTE

Use the following release to point out the important elements.

**ST. FINBAR PTA**  
424 S. Finbar Street  
St. Finbar, New State 09031

**FOR MORE INFORMATION:**  
Jane Mayer, PTA President  
777-666-2121  
janemayer@stfinbarpta.org  
June 24, 2010

## FOR IMMEDIATE RELEASE

Today, members of the St. Finbar PTA released a report showing that high school graduates who speak a second language have an employment rate twice that of graduates who speak only one language. They demanded that School Board Member Linda Nagashima vote to continue funding the school buses which make the magnet schools of St. Finbar possible.

“The School Board is saving pennies now, and depriving our children of dollars later,” said Jane Mayer, president of the St. Finbar PTA. “Programs like the one at the Linguistic Academy prepare our children for the jobs of the future. Why do Linda Nagashima and the other school board members want to jeopardize our children’s future employment?”

Ten children were on hand to wrap Ms. Nagashima’s office (at 1833 Office Way, St. Finbar) with a huge paperchain, on which they and their parents had written, “Please save our school” in 27 languages. The chain had 10,000 links and reached around the office five times.

“Quiero aprender español,” said Jackie Hoong.” Por favor, guarde nuestra escuela.”

Professor Luiz Martinez, of St. Finbar College, author of the report, said, “Today’s children need these schools for tomorrow’s jobs. I can’t imagine what the school board and Linda Nagashima are thinking. The employment data clearly shows children need this program. The large numbers of parents involved shows that everyone appreciates, except maybe the school board, the importance of funding transportation so our children can get to their school.”



## INSTRUCTOR NOTE

**On the pages that follow are directions for a Media Exercise.**

There are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be the most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.



## Checklist For Media Events

### All Levels

- ☐ Have the date, time, and place been cleared with all the speakers?
- ☐ Are there other media conflicts (e.g., another major event or press conference)?
- ☐ Is the room large enough?
- ☐ Will you need a public address system?
- ☐ Have volunteers been recruited to set up and clean up the room before and after the event?
- ☐ Do you plan to serve refreshments? If so, have people been asked to bring them?
- ☐ Who is sending the media advisory?
- ☐ Who is making follow-up phone calls?
- ☐ Is there a script available for those making follow-up phone calls to the media?
- ☐ Are visuals, charts, or graphs needed at the press conference?
- ☐ Who is writing each person's presentation? Are there good quotable sound bites?
- ☐ Do you need translators?
- ☐ Is a time set for speakers to rehearse their presentations and answers to the anticipated questions?
- ☐ Are materials being prepared for the press kit?
  - ☐ Press release
  - ☐ Background information on speakers
  - ☐ Fact sheet
  - ☐ Organizational background
  - ☐ Copies of speakers' statements
- ☐ Is someone drafting a question and answer sheet for anticipated questions at the press conference?
- ☐ Will your organization's name be projected well through signs, posters, buttons, and so forth?
- ☐ Is someone assigned to hang the banner? This can take a while.
- ☐ Is there a podium sign?
- ☐ Who will greet the media and staff the sign-in table?
- ☐ Is someone in your group going to take photos & videos?
- ☐ Who is assigned to assist the speakers with details at the press conference?
- ☐ Who will send releases to those who don't attend the press conference?
- ☐ Who will call reporters who don't attend, but will need the information immediately in order to use it?
  - Are volunteers assigned to watch for stories in various media?
- ☐ Will thank you notes be sent to all spokespersons and volunteers?

## Media Exercise

**Local**

### MEDIA AND THE CAMPAIGN TO RESTORE BUS SERVICE TO ST. FINBAR MAGNET SCHOOLS

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA at the Linguistic Academy in St. Finbar, working to save the busing program for magnet schools. Your PTA unit and others brought a large group of parents to the school board meeting, and a number of them were able to give testimony about how their children would be impacted if the busing were eliminated. The school board just ended their meeting without making any decision. The board members are clearly nervous about so many parents showing up, but they keep saying there just is not enough money. They postponed the decision for one month.

## Media Exercise

### Local

### ASSIGNMENT

#### Exercise 1

As you leave the school board meeting, a reporter thrusts a microphone at you and asks for a comment.

What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after the school board meeting, you and three or four other parents are on a public affairs talk show on the local public radio station.

The president of the school board was on just before you, and he said that there simply is not enough money. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.

## Media Exercise

State

### MEDIA AND CAMPAIGN TO INVEST IN NEW LEIF'S CHILDREN

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA in the Fremont School District, working to save school funding which the state legislature is proposing to cut. Your PTA unit and others brought a large group of parents to the state capitol to talk with State Senator Olivia Rosten, as a part of a much larger rally organized by the New Leif State PTA and its allies. Your PTA unit president was one of the speakers at the rally on the capitol steps, and then a delegation from your unit went to Sen. Rosten's office and met with her. She listened, but refused to commit to vote against the funding cuts. She is still undecided, she says. She wants to cast a vote that will be fiscally responsible and balance the state budget. The actual vote is still a month away.

## Media Exercise

## State

### ASSIGNMENT

#### Exercise 1

As you leave the state capitol building, a reporter thrusts a microphone at you and asks for a comment.

What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after the rally and meeting with Sen. Rosten, you and three or four other parents are on a public affairs talk show on the local public radio station.

The State Senate Finance Committee Chairman was on just before you, and he said that there simply is not enough money. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.

## Media Exercise

## Federal

### REAUTHORIZATION OF THE CHILDHOOD NUTRITION ACT

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA county council in the district of Congressman Ethan Charles, working to get federal nutrition standards for competitive foods. Your PTA unit met with Rep. Ethan Charles at his district office to ask him to vote yes for nutrition standards. He says that he needs more time to study the issue; he is reluctant to have the federal government tell children and their parents and their local schools what to do. The actual vote is still a month away.

## Media Exercise

## Federal

### ASSIGNMENT

#### Exercise 1

As you leave the district office building, a reporter thrusts a microphone at you and asks for a comment. What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after your meeting with Rep. Charles, you and three or four other parents are on a public affairs talk show on the local public radio station.

The president of the Snack Food Association was on just before you, and he said that they are being blamed, when they are doing everything they can to produce healthy snacks. Besides, it is up to parents to teach their children what to eat. The money from the soda machines pays for lots of extras at local schools, like uniforms for sports teams. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.



## Module 5: Social Media



### GOALS

By the end of this module, participants should be able to understand:

- Today's social media outlets and their potential and power in an issue campaign.
- How to use social media to increase PTA awareness and exposure.
- Best practices in using the most popular social media outlets.
- Tools to build an effective social media campaign.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

This session requires trainers to have a working knowledge of social media. They must also be able to lead discussion about why people participate in social media and how it applies to the issue at hand. This session will educate activists on best practices and ideas for effective social media campaigns.



### MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers
- PowerPoint presentation
- Prepared examples of highly effective advocates on social media, such as celebrities, politicians, musicians, pop-icons, etc.



### HANDOUTS

- PowerPoint Printout
- Social Media Tipsheets



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



## COPYRIGHT NOTICE

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## Introduction

### WELCOME TO MODULE 5: SOCIAL MEDIA



#### SAY

By the end of this module, you should understand the following concepts:

- Today's social media outlets and their potential and power in an issue campaign.
- How to use social media to increase PTA awareness and exposure.
- Best practices in using the more popular social media outlets.

This training assumes that you have a basic understanding of social media, including proper terminology, how to set up an account, and how to use the basic functions of each platform.

### I. SOCIAL MEDIA OUTLETS AND STATISTICS



#### SAY

Before discussing how to use social media, let's take a brief look at how social media is currently used in the U.S. and around the world.



#### INSTRUCTOR NOTE

This section accomplishes two objectives:

1. It lets participants know that social media is for everyone, everywhere—not just teenagers. Point out that people age 50+ are the fastest growing demographic on Twitter. Social media is a viable means of communication for everyone and heavily used throughout the world.
2. It conveys to participants that the world of social media is huge and it is imperative to use these platforms to reach more people as part of their advocacy campaigns.



#### ASK

How many of you in this room use some form of social media like Facebook, Twitter, or YouTube?



#### SAY

Great, almost everyone here! Today, we are going to discuss the various social media outlets and provide some practical ideas to get you started. In order to be effective with limited time, you must reach your audience where they already are. Let's take a look at a few of the larger social media outlets.



## DISPLAY ON A FLIP CHART OR POWERPOINT:

- Facebook
- Twitter
- Google+
- YouTube
- LinkedIn
- Instagram
- Flickr
- Pinterest



## SAY

*Facebook* is a social networking site which allows its users to set up personal profiles to connect to family, friends, businesses, and organizations. Facebook has more than 1.1 billion active users. Currently, more than 350 million active users currently access Facebook through their mobile devices. Each user has an average of 130 friends and is connected to 80 community pages, groups, or events. More than 700 billion minutes are spent per month on Facebook, so you can see that it is a great use of your time to use this outlet in your social media campaign. Facebook should be your primary social media outlet.

*Twitter* is what people refer to as a “microblogging” social media outlet. Twitter allows users to send and receive text-based messages known as “tweets.” Twitter has more than 300 million users who average over 300 million tweets per day. Just a fun fact, it took 3 years, 2 months and 1 day to go from the first tweet to the billionth tweet. One billion tweets are now sent every week. There are over 1.6 billion search queries per day on Twitter. Twitter is a great way to supplement your activity on Facebook, and using these two outlets together will expand the reach and power of your PTA and/or issue campaign.

*Google+* surpassed Twitter as the second largest social networking site in 2013. Google+ boasts 500 million users. This platform offers a broad range of features, including friend circles, news streams, hangouts, messenger, and games. It also has pages for companies and brands, similar to a fan page on Facebook.

*YouTube* is a video sharing website and the second largest search engine in the world. Every minute, users upload 24-hours worth of videos.

*LinkedIn* is a social network that allows professionals to connect. More than 225 million members in over 200 countries and territories use LinkedIn. New professionals are joining at a rate of two users per second. Of all the companies that use social media for recruitment, more than 95 percent of them use LinkedIn.

*Instagram* is a social media outlet that allows users to upload, edit, and share pictures and videos on Instagram's platform, as well as other social media outlets, including Facebook and Twitter. Instagram has over 100 million active users.

*Flickr* is an online image and video hosting site operated by Yahoo. Flickr has more than 50 million registered members, hosts more than 6 billion images, and offers members one terabyte of free cloud storage space.

*Pinterest* is a digital “bulletin board” where users can “pin” and share articles, pictures, ideas, recipes, quotes, etc. with friends and followers. Pinterest has over 48 million members, and is most popular among women.

## II. WHERE SOCIAL MEDIA AND PTA COLLIDE



### SAY

Conversations are happening all the time on social media. Conversations are shared with others. Because of the respective sharing capabilities of each social network, conversations and discussions can be shared with large groups of people in a short period of time. This accomplishes a number of things, but two of the most important for your PTA are awareness and exposure.

#### **PTA Awareness through Social Media**

The social media platforms we discussed can serve as a “conversation catalyst” for education reform and child advocacy. Simply bringing awareness to PTA efforts could be very effective for membership growth, member participation, volunteer development, and most importantly, strategically advancing your issue campaign.

#### **PTA Exposure through Social Media**

Social media makes significant exposure of your PTA and your issue campaigns possible. More than 90 percent of people trust peer recommendations, while only 33 percent trust messages from brands and organizations. The PTA implications run deep here. If we can get folks to talk and share information about PTA and issue campaigns, their friends are more likely to respond more favorably than they would to a message directly from National PTA.

“Virality.” What does this word mean to you? By definition, a virus is able to induce some agents to replicate it, resulting in many copies being produced and spread around. How does this relate to social media and the PTA?

World-renowned author and marketing guru Seth Godin talks about the “ideavirus,” a good idea that is worth spreading. He goes on to say that an “ideavirus” needs “sneezers,” people who spread this “ideavirus.” The more sneezers we have the more the ideavirus spreads. Keeping in mind that, and remembering that on average, every Facebook user has 130 friends, the potential for virality on Facebook is limitless. Good ideas spread, it is as simple as that. In a little bit, we’ll talk about practical ways to get PTA ideas to spread throughout social media.

People on social media gravitate toward causes that they can get behind, support and promote. The PTA is no different than these causes:

- Invisible Children – fighting to free child soldiers in Africa – Nearly 500,000 fans on Facebook
- Focus on the Family – with nearly 300,000 fans on Facebook
- Feeding America – with nearly 200,000 fans
- Salvation Army – with nearly 70,000 fans

National PTA has approximately 30,000 fans. That is pretty good, but not good enough. How is your PTA doing on Facebook? People want to be a part of life-giving, culture-shifting, game-changing causes and organizations on social media, and PTA can be that outlet. Why?

People want the good ideas to be their ideas. If it's something worth sharing – an inspiring video, a new way of thought, an exciting new idea in the world of advocacy for children – most people want to be the first of their friends to share it. Everyone has a circle of influence. That means in every circle there are influencers. These folks want to be the ones who share the best content first. Every viral video on YouTube becomes viral because people want to be the first of their friends to share it. But it all goes back to the content of the “idea virus” that makes people want to share it. If the quality of the content is fresh and exciting, then the number of shares will increase.



## ASK

Does anyone have an example of a Facebook post that received a large number of likes? What about an example of a Facebook post that flopped? These examples are a great transition into the next part of this training: best practices in social media and finding ways to increase your effectiveness and maximize your returns.

## III. SOCIAL MEDIA BEST PRACTICES



### DISPLAY ON A FLIPCHART OR POWERPOINT:

#### Create Your Social Media Process by “Rolling the Dice”

D – Designated Responsibility

I – Integrated Approach

C – Content Creation Methods

E – Editorial Calendar



### SAY

Every good social media strategy must begin with a content strategy. I like to break down a social media content strategy like this...D.I.C.E. It's time to roll the DICE!

- **D is for “designated responsibility.”** Who will be posting the content? One person? A team? This needs to be cleared up first so it's not fuzzy as to how it will get done.

Your PTA also needs to identify the workflow and the process of approval that is appropriate for your structure and agreed upon by your PTA leadership. You should also consider creating a policy for dealing with negative comments. Many experts encourage allowing a real dialogue, and that means allowing comments that you don't necessarily like or agree with. Don't feel like you have to address every comment during a debate on an issue. You can restate your opinion or policy, but allow your other followers to have your back. You should always delete vulgar or inappropriate comments.

- **I is for “integrated approach.”** This content should go to different social outposts, Facebook, Twitter, YouTube, Flickr, Google+, etc. However, don't over commit yourself. If you can't manage to post fresh content daily, you want to take a step back and reevaluate your plan. Make sure that your team is set up to publish content on these different platforms. An integrated approach will help to broaden your reach as well.
- **C is for “content creation methods.”** As a local unit, what systems are you putting into place to capture noteworthy stories? Is it a spreadsheet? An email thread? Anything you can put into place to capture stories before they are yesterday's news will help you stay relevant in the social media world.
- **E is for “editorial calendar.”** If you're like me, it won't get done unless it's written down and this piece ties in every other point. On a calendar, you can note who is posting, where they are posting, and how you identify your content topics. This is the final piece to a successful social media strategy.





## DISPLAY ON A FLIPCHART OR POWERPOINT:

### Social Media Best Practices:

- Variety
- Tone
- Timing



## SAY

### Facebook Best Practices

*Variety.* Be sure to publish different types of posts. A good social media engagement plan integrates multiple types of posts, not just status updates and not only pictures. Here is a list of post types to work into your social media plan: general status updates, “click like” posts, photos, events, links to websites, links to articles, quotes, questions, calls-to-action, videos, testimonials, announcements, breaking news, and how-to posts.

*Tone.* Be sure to consider your tone and know that your audience may perceive your tone differently, as in any electronic communication. Try to use a personal tone, tap into emotion, and stir debate among your audience.

*Timing.* Shoot to post during peak hours. Facebook and other social media outlets are most active in the early morning (around 9:00 am), at the end of work (around 5:00 pm), and late at night (around 11:00 pm). If your usage peaks during these time periods, you will increase the odds that your target audience will see your content.

### Twitter Best Practices

*Respond quickly.* This is particularly important when dealing with customer service comments and concerns. You should stay current with Twitter mentions and respond to concerns within two hours.

*Space out tweets.* Tweets should be spaced throughout the day so that they ideally reach your followers' feeds at periodic times. If you only tweet at one time of day, you lose a lot of visibility. Third-party applications, such as Hootsuite, allow you to schedule your tweets and allow multiple users to access the same account to help spread out the workload.

*Too much self-promotion can be a bad thing.* When an organization does nothing but promote its message, people won't listen and they won't follow. Thirty percent of tweets should be related to PTA, while the other 70 percent of tweets should be about related topics that provide value to your followers. Include a link to a website, blog post, article, etc. Not only is this a great way to leverage your other platforms, it also gives you credibility as being a source of great content.

*Choose who you follow.* Certain Twitter directories, such as WeFollow or Tweepz, allow you to locate users to follow based on their interests and geography. Follow people who either mention you, or are interested in the services or products you offer. Follow people who are retweeting you or mentioning your name. However, if you follow too many people too quickly, you can lose credibility.

*Build a relationship with users.* Make sure to thank people for mentioning you, following you, or just comment on something they said that was interesting. If they post interesting content, feel free to retweet it. Generally, people will follow you if you genuinely reach out to them.

*Join the conversation.* If people are talking about things that matter to you, feel free to join the conversation! This gives your brand a human voice and shows that you care.

## **Facebook Fan Page Best Practices**

*Respond quickly.* Just like Twitter, you should respond to comments/ inquiries within two hours.

*Join the conversation.* It's okay to respond to conversations within a response thread from a post. You can respond directly to several individuals within one comment too. Just make sure to identify who you are responding for each statement you make.

*Develop relationships.* Get to know the people who are frequently commenting on the page. Engage in conversation with them by asking questions and responding to posts. Developing these relationships is crucial when developing a strong base of "super fans." These relationships can be effectively leveraged in future campaigns.

*We're all in this together.* Try to avoid "I" statements. Brands are all about "we", "us" and "our" and your voice and communication strategy should reflect this mentality.

*Find a voice that works for your PTA and issue and use it!* For easy usability, you should adopt a voice for PTA. Every administrator with access to the page should be familiar with the voice. This will allow multiple people to actively respond to comments and concerns, while creating a consistent voice.

*Make your page "sticky."* A potential fan has arrived on your page, now what? It is important to maximize their experience; the more engaging the better! You want them to stay there as long as they can and enjoy their time on the page. Try to have links back to your website. Clearly delineate who you are and what you stand for. Make it easy for users to find more information.

*Check it twice!* Be sure to double and triple check spelling and grammar. Nothing shows you care like proper grammar and punctuation, especially in PTA.

## Social Media Exercises

All Levels

Participants will practice several aspects of using social media in small groups.



### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

## SOCIAL MEDIA EXERCISE INSTRUCTIONS

Split the attendees into three small groups. Assign each group one of these four topics:

- Facebook – Create a week's worth of ideas for Facebook posts on an issue of your choice, including topic, post type, tone and timing.
- Twitter – Create a week's worth of ideas for twitter posts on an issue of your choice, including topic, post type, tone and timing.
- PTA Process – Create the guidelines that a PTA might need to implement a social media strategy: a workflow, approval process, comments policy, color schemes, logo, etc.

Give the group a five-minute warning before the end of the 20 minutes, and then call them back to order to report when the 20 minutes are up.

## SOCIAL MEDIA DEBRIEF

Call the class back to order. Have each group present their ideas, provide feedback, and open the dialogue for all attendees to add more ideas for each topic.

# HANDOUTS



# National PTA<sup>®</sup> Social Media: Blogging Tip Sheet

**National  
PTA<sup>®</sup>**  
*everychild.one voice.<sup>®</sup>*

**Blogging** allows your local PTAs to have a consistent stream of fresh, timely new content to tweet, share on Facebook, use in your e-newsletter, and so on. Blogs allow PTAs to tell their stories, break news, comment on breaking news, and share resources quickly. While there are no set rules for creating a blog and writing blog content, here are some guidelines to make your PTA blog effective.

Reference: Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA: McGraw-Hill

1. **Blogs need to make a strong first impression.** When designing a blog the template should be simple, visually powerful, and spacious. Too much clutter and multiple columns can easily overwhelm the reader.
2. **Feature the ability to subscribe to your e-newsletter and join your social networking communities.** The upper right corner of your blog is the most valuable section of the page in terms of visibility and impact. Feature the ability to subscribe to your newsletter, a campaign, and any social networking icons in that spot. As blog traffic increases so will new subscribers, friends, followers and fans.
3. **Blog titles are priority. Make sure the blog title is bold and engaging.** It should also include key terms and words relating to your subject matter.
4. **Emphasize quality content.** The length of blog posts is not as important as the quality and relevance of the blog posts. Content should be important and useful to your audience. The content should engage readers and make it worth their time. Word use should be efficient—don't waste words. Only add words that support your points. Avoid fluff.
5. **Optimize content for web reading.** People tend to scan online articles rather than read them word for word. Use bullet lists whenever possible. Boldface keywords (or people's names) to break up long sentences and paragraphs.
6. **Allow comments but moderate them.** All blogging platforms have a notification system that allows you to moderate comments before they go live. You should allow comments but you don't have to approve them all, particularly if they are rude and disrespectful in tone.
7. **Add share and search functionality buttons.** Make sure the blog platform you choose automatically comes with share and search functionality or that you have the ability to add a share plug in.
8. **Use photos/videos in all blog posts.** Blog posts with images tend to get more traction. Post at least one photo per blog post if possible. You can also do a quick Google Image or Flickr Creative Commons search if you have nothing in-house to use.
9. **Create "Top Ten" posts.** Posting a blog about the top ten reasons your PTA is awesome is a great way to showcase your organization in a short, concise and interesting way. Use top tens or top fives to give people information on your PTA.
10. **Be consistent.** Try to blog once a week and at the same time every week. Followers appreciate consistency and routine. Even if you just describe what you are working on this week, share it with the people who have invested time in your blog.
11. **Share your blog content.** Cross promote your blog content on your other social networks like Facebook and Twitter.
12. **Solicit engagement from readers.** Ask people to comment and email ideas. Post polls to survey ideas. Keeping readers engaged will keep them returning.

If you want more information about how your PTA can best utilize social media, please contact our Communications Department. This tip sheet is one of many resources that National PTA offers members. Go to **PTA.org** for more!

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Twitter - @NationalPTA

PTA Great Idea Bank - [www.ptagreatideabank.org](http://www.ptagreatideabank.org)



# National PTA<sup>®</sup> Social Media: Facebook Tip Sheet

**National  
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*everychild.onevoice.<sup>®</sup>*

**Facebook** is a great way to do Social Media marketing for your PTA. Facebook is perfect for brand awareness because it is free advertising and promotion for your local PTA, it allows you to share information with your members, it will enable you to start conversations on various topics, and it gives them the chance to share with their friends as well.

Reference: Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA:McGraw-Hill

1. **Create Your Voice.** Your voice will often be found in the status updates of your fans, which means it is very important to find content that engages your fans and encourages them to want to engage with you. A great way to help you gauge this will be by the number of likes, shares, and comments you receive on your posts.
2. **Fun and Informative.** A great place to get started with content is to share success stories, breaking news, grant deadlines, calls to action, events, and information shared by National PTA.
3. **Professional vs. Personal.** While adding personality and flair is important, keep in mind that there is a difference between a personal Facebook page and your PTA's professional one. Set up rules of etiquette for your PTA's Facebook page so that everyone knows the rules and can help make it a safe place for sharing information.
4. **More Than One.** Be sure to have at least two people (although three would be best) as administrators of your PTA Facebook page. This way if someone is sick, traveling, unreachable or has to leave for any reason there are multiple people with access to the page. This also helps spread the responsibility for posting and sharing content, lessening the pressure on everyone.
5. **Posting Limits.** Be sure to limit the number of posts. Too many posts will cause people to hide or un-Like your Facebook page. Ideally, four to six posts per week is best, though you should not post more than twice a day.
6. **Content Sharing.** Be sure to share links, videos, and pictures whenever possible in your posts. This will help increase your PTA's visibility and activity. Facebook is all about sharing information.
7. **Tagging Gold.** Tag sponsors and supporters whenever possible; this will help them to keep up with what you are doing and engage them more. Plus, it gives them greater visibility among your PTA members and supporters.
8. **Events.** Create events and send them to the fans of your page. It will remind them about your unit and your events, and it will help you engage them in a new way.
9. **Do Not Automate.** It is always tempting to automatically sync several social media platforms to Facebook so you only have to send one status update. However, avoid doing this as much as possible because each social media platform is unique in the culture of the community and the way content is shared.
10. **Encourage.** Do not forget to encourage your PTA board members, volunteers, students (if you are a PTSA), teachers, and families to engage and be active on your PTA page. This will help create a flow of information and sharing that will encourage everyone! Most of all, do not forget to have fun, learn a lot, and remember that social media is just another resource for you, your members, and the parents and teachers that will give every child one voice!

If you want more information about how your PTA can best utilize social media, please contact our Communications Department. This tip sheet is one of many resources that National PTA offers members. Go to **PTA.org** for more!

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# National PTA<sup>®</sup> Social Media: Twitter Tip Sheet

Companies and organizations use **Twitter** primarily for sharing about a product, brand or a program. It is also used to make announcements and share breaking news. All updates on Twitter should be 140 characters or less. The tips below will help increase your followers and enable you to get your message to a larger audience.

Reference: Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA:McGraw-Hill

1. **Develop Your Twitter Voice.** The kind of content and the tone your members and followers respond to will help you give your Twitter voice personality. Your ultimate goal should be to inspire action and reaction from your followers.
2. **Track Your Links!!!** Use a Twitter app like Bit.ly or Ow.ly to track your links. They shrink your long links which allows more characters for tweeting. It also provides useful statistics on the number of people that click on your links.
3. **Tweet your Content as Well as the Content of Others.** Master the art of both retweeting and responding. Tweet articles or blog posts from your favorite newspapers, bloggers, and partner organizations. These practices will encourage your followers to retweet your content and information.
4. **Follow on a 1:1 Ratio.** If you have 1,000 followers, then you should follow 1,000 Twitterers in return. This will help your visibility and let your followers know that you are vested in them.
5. **Follow People with Similar Interests.** Help increase your visibility and understanding of your audience by following users with similar interests that are relevant to your goals and objectives. Do not forget to tag them in your messages by using the @ symbol.
6. **Integrate.** To maximize the success of your Twitter efforts, integrate into other online and offline materials. Incorporate a Twitter feed on your website, add a link to follow Twitter into direct mail pieces, and include a "share" button or Twitter link in an e-mail or e-newsletter.
7. **Drive Website Traffic.** 140 characters does not provide much room for detail. Offer a hook and lead your followers to your website or PTA.org for more information.
8. **Tweet Often.** Experts recommend tweeting four to six times per day. For some local units that may be too overwhelming. Twitter is most active from 9 am to 12 pm in any given time zone so focus your attention on tweeting during that time span.
9. **Use Hashtags Strategically.** Hashtags (#) allow Twitterers to discuss issues and events on Twitter in real time. They also help to organize tweets, spread information and find new friends. Tweets should not have more than one or two hashtags.
10. **Design your Twitter Profile to Match Your Local PTA logo.** Try to blog once a week and at the same time every week. Followers appreciate consistency and routine. Even if you just describe what you are working on this week, share it with the people who have invested time in your blog.

If you want more information about how your PTA can best utilize social media, please contact our Communications Department. This tip sheet is one of many resources that National PTA offers members. Go to **PTA.org** for more!

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# National PTA<sup>®</sup> Social Media: YouTube Tip Sheet



**YouTube** is the social web site that lets people upload online videos and participate in free video-sharing, commenting, liking, and re-posting. YouTube allows registered users to put their videos and share video clips online and share with others.

Reference: Mansfield, Heather (2011) A How to Guide for NonProfits: Social Media for Social Good. USA:McGraw-Hill

1. **Create Your Story.** The main goal of YouTube is to tell a story with video, music, pictures, etc. This can then be shared with your PTA members, parents, teachers, school administrators, and your community.
2. **Fun and Informative.** Storytelling on YouTube is meant to be fun, creative, and informative.
3. **Searchable.** Be sure to tag your videos so they can be searched and found by PTA members, parents, teachers, and anyone interested in the PTA mission.
4. **Comments.** Social media is about engaging and creating a conversation, so be sure to enable comments on your videos.
5. **Content Sharing.** Some of the best and more engaging aspects of YouTube is the ability to share among other platforms. Do not forget to share your own videos on other PTA platforms and encourage your members and followers to share as well.
6. **Tagging Gold.** Tag sponsors and supporters whenever possible; this will help them to keep up with what you are doing and engage them more. Plus it gives them greater visibility among your PTA members and supporters.
7. **Channels.** YouTube has the ability to create a space that holds all the videos uploaded by your PTA group. Go to [youtube.com/create\\_account](https://youtube.com/create_account). Be sure the username you sign up with is the one you want included on your channel.
8. **Descriptions.** The description you give your channel should be short and simple. No one wants to read on YouTube; they want to watch a story of some sort.
9. **Thank You.** Do not forget to do a "Thank you" video or a year in review video to promote your accomplishments and let volunteers know how much their work is appreciated. The shout outs are always a great way to get additional shares.
10. **Encourage.** Do not forget to encourage your PTA board members, volunteers, students (if you are a PTSA), teachers, and families to engage and be active on your PTA page. This will help create a flow of information and sharing that will encourage everyone!

Most of all, do not forget to have fun, learn a lot, and remember that social media is just another resource for you, your members, and the parents and teachers that will help your members speak for every child with one, powerful voice!

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## Module 6: Recruitment And Organization Building



### GOALS

By the end of this module, participants should be able to understand:

- The concept of self-interest and how it is used to recruit and retain volunteers.
- The Six-Step Process of Recruitment.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

This session relies more on the experience of the trainer than the other session do. It raises questions about leadership development that are difficult to answer unless you have actually done it. It also requires skill in both guiding the discussion of why people participate in organizations, and critiquing the role plays.



### MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



### HANDOUTS

- PowerPoint Printout



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 6: RECRUITMENT AND ORGANIZATION BUILDING



#### SAY

By the end of this module, you should understand:

- The concept of self-interest and how it is used to recruit and retain volunteers.
- The six steps for successful recruitment.
- Self-interest of the media.
- Planning your use of the media.
- Guidelines for using the media.

### MOTIVATION OF LEADERS AND MEMBERS



#### ASK

We're going to start by talking about how you got involved in PTA. Think back to when you first decided to take an active role in the PTA. Tell us why and how it came about.

Write the following headers on two flipchart easels:

Easel 1

**WHY?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Easel 2

**HOW?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



## INSTRUCTOR NOTE

When hands go up, do as follows: Recognize four or five people, and write their responses on the chart paper in two columns. What you are looking for is, first, that someone got them involved, and second, that there was an element of self-interest in their involvement.



## ASK

The language is important. Ask, “How and why did your involvement come about?” If you ask the question differently, you will get a different kind of answer. “Why” will bring out the self-interest reasons for involvement. “How” will bring out the way it happened. You are looking for: “someone asked me to join,” “to come to an event,” or “to come to a meeting.”

Push people if need be. If everyone is saying that they just felt that they should become a leader, ask how they got into a leadership position instead of asking why. How did it happen that you actually started to take more responsibility?

What was the first thing you did? How did you come to do it? It usually turns out that there was someone who made a point of involving them.



## INSTRUCTOR NOTE

The second point you want to uncover in these stories is the presence of self-interest. It can be:

- **Specific** — “I was sick and tired of the number of kids not reading at grade level.”
- **General** — “I felt angry and wanted to do something.”
- **Social** — “This looked like a good way to make new friends.”
- **Professional** — “I thought it might help me find a job.”
- **Recreational** — “My kids were in school and I wanted to get out of the house.”

Usually it is some combination of these, but people are often reluctant to say anything other than the first two. Try to get them to say it.

As you write the responses on the charts separate them onto the two charts. On the “Why” chart list the self-interest reasons people give.

On the “How” chart write the name of the recruiter: “my friend,” “Rev. Nelson,” or “my father.”

When you have several good examples up on the board, stop and go back over the answers.

Point out the self-interest responses and write “Self-Interest” next to “Why.”

Then, point to the list of recruiters. Next to “How” write “Recruiter.” Again, make the point that most of us in this room joined for very different, but specific, reasons involving our own self-interest. What usually motivates people to join an organization or take a more active leadership role is self-interest.



## ASK

Ask the group for a definition of “selfishness.”

*[Possible Response: Being concerned only about self; everything is about me. Note that everybody can agree that selfishness is bad.]*

Ask for a definition of “selflessness” or “altruism.”

*[Possible Response: Only being concerned about others, not paying attention to one's own needs.]*

Ask if being totally selfless is always good? Are there examples of selflessness leading to problems?

*[Possible Response: Generally someone will point to two problems with selflessness:*

*1) it leads to burnout if you don't take care of your own needs and*

*2) some people act like martyrs and want special recognition. Mothers usually have good examples from their own experience as moms, wives, and daughters!]*



## SAY

By self-interest we don't mean being selfish. The word interest comes from a Latin word meaning “between or among.” So self-interest means self-among-others, or how we are aware of ourselves and our own needs in the context of our relationships with others.

As we have just seen, people joined organizations or took more responsibility, not just because it was the right thing to do, not just because they were concerned about the issue, but because they also got something else out of it. Learning a new skill, making new friends, or the feeling of satisfaction that comes from fighting the good fight.

We need to help new members identify their self-interest in joining our organization, whether it is directly to impact an issue, or to meet new people, or gain new skills. Naturally, we won't do this by asking directly, “So what is your self-interest?” People would think we are crazy! But we can ask people about their preferences and take the time to get to know them and what they get satisfaction from. We can let them know that it is good to think about what particularly interests you, what gives you energy and keeps you motivated. We can't meet everyone's self-interest, but if we don't look for self-interest, we are likely to lose volunteers or burn them out.

Meeting self-interest helps with recruiting new people, but it helps even more with retaining volunteers! If people feel that their participation in the organization is fulfilling, they are far more likely to stay involved. Of course, what brings a new person in may not be what keeps them, because self-interest changes and develops. A person might join because she is upset about school funding cutbacks, but stays because she likes the PTA members and wants to spend more time with them. She gets a chance to develop skills in running a meeting and begins to get recognition as a leader.

In this room, we are highly motivated leaders in PTA. Yet, many of us did not become active because we got a flyer or heard about the organization through a public service announcement. Someone asked us to get more involved. People may pay dues, but the average person waits to be asked to do more than that. We have to be the person who recruits others, by personally asking.

We also saw that when people joined or moved up in an organization, there was another person helping it to happen. Someone was actively trying to get each of these people more involved.

## RECRUITMENT GUIDELINES — THE SIX-STEP PROCESS OF RECRUITMENT



### SAY

Each of you needs to become that person who gets others involved. We will list six steps to successful recruiting. They are useful for getting an individual to join your organization and getting members to take on more responsibility.

#### The Six-Step Process of Recruitment is:

1. Be prepared.
2. Legitimize yourself.
3. Listen.
4. Agitate.
5. Get a commitment.
6. Follow-up.



### DISPLAY ON A FLIPCHART OR POWERPOINT:

Write the steps of the Six-Step Process of Recruitment at the top of a flipchart, and then write each step on the flipchart one at a time as you cover each.



### SAY

#### 1. Be Prepared.

- Learn as much as you can about the person.
- Set specific objectives for what you want the person to do, and think of something else in case they say no. For example:
  - I want this person to join the committee.
  - I want this person to volunteer for the voter registration drive.
  - I want this person to be the newsletter editor.

## 2. Legitimize Yourself.

- Get a “license to operate.” This is a statement that establishes the legitimacy of the organization or connects you to the person you are recruiting. It particularly applies to recruiting people who don’t know you. Find a common interest, for example:
  - I am part of PTA in your child’s school.
  - Our children are both in Mrs. Espinosa’s class.
  - Our friend Ruth suggested that I talk with you.
- Have an appropriate image.
  - We would all like to think that appearance and language don’t matter, but, in reality, they send a message that can be different from what we actually want to say. For example, suppose a member is working on the problem of school funding. The member has been working with policy analysts and, during a discussion, uses acronyms and numbers that make him or her sound very knowledgeable. What can come across to a new person is that s/he won’t fit in unless s/he learns to talk like that.

## 3. Listen.

- Draw the person out. Ask open-ended questions! Get them to talk about their concerns related to the issue at hand. Having them state the problem is much more powerful than you telling them what the problem is. You can add facts and figures to document their concern.
- Identify self-interest. Listen for what excites, angers, or motivates them. What do they care about in regard to the issue? What potential organizational positions might they fill?
- Build rapport/trust. Share a little of your own story. Express concern. Do not promise that joining the organization or participating in the campaign will solve all the problems, because they will never believe you.
- Establish personal connection beyond the issue. Talking about children is most natural for PTA members. Be sure to ask about their kids. Are their children on sports teams with your children, in the same class, or in the same clubs? If their children are younger than your kids, you can share useful information you wish someone had shared with you. Hobbies, books, sports, movies, and pets also make good points of connection.
- Hear and answer reservations. Do not promise all problems will go away. Sometimes, the problems just need to be acknowledged.
- Listen for networks you can organize. To what other groups does this person belong?

## 4. Agitate.

- The goal is to help the person to see that this is his/her issue, as well as your issue. Discuss the issue in a way that makes the person mad at the primary decision-maker.

*Examples:*

- *Did you know that every month the school is sprayed with pesticide? When we asked the principal how long it took the chemicals to lose their toxicity, he said he didn't know. Our children's health is at stake here.*
- *The state has cut funding for schools every year for the past three years. The politicians are always talking about how important children are, and how parents should be helping them learn, but when it comes time to support our schools, all they say is that there isn't any money. But there was money for the governor's pet projects, wasn't there?*
- *Solution equals organization. Give examples of how a similar problem was solved, either here or elsewhere, through organization — large numbers of people can do what one person can't. Match the organization's need to the individual's self-interest.*

## 5. Get A Commitment.

- Ask, "Will you come?"; "Will you do it?"; or "Will you leaflet your building Thursday?"
- Clarify next steps. For example, "I will call you tomorrow with the exact information on when the bus is leaving, and you need to get the \$30.00 in by Tuesday, October 2nd."

## 6. Follow-Up.

- Keep commitments.
- "I'll call to remind you."
- Help integrate the person into the organization.

There is nothing worse than making a big effort to recruit someone, and then ignoring them when they finally do show up.

The steps we most often forget are Listening and Follow-Up. Circle them with marker.



## INSTRUCTOR NOTE

There are no handouts for this exercise.

### **On the pages that follow are directions for a Recruitment Exercise.**

In the case of this exercise, there is only one "level." This exercise is to be used regardless of the level to which you have tailored your presentation, whether it be local, state, or federal.



## Recruitment Exercise

All Levels

Participants practice recruiting volunteers for an issue advocacy campaign.



### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

In order to give more people a chance to do role plays, divide the group between the trainers and hold two sessions in different rooms. If you have more trainers, you can make more groups.

- Place two chairs in a spot where everyone can easily see them and hear what is being said.
- There will be one or two one-on-one role plays in front of the whole group. Repeat the sequence if time allows. You should only spend a total of 15 minutes here and save the rest of the time (35 minutes) to do more recruitment in small groups.
- Recruit an individual or inactive member to get active in the local unit or county council.
- Recruit someone who is already an active member, to take responsibility for some project, or run for a county council office.
- Announce the two topics and then pick a person who you think will do a good job (balance for gender, age, race, etc.). Say that the role plays should each last about five minutes.
- Step out in the hall with the volunteer and ask her to think of a real life person she wants to recruit and describe the person to you in a sentence. What are the person's name, age, occupation and interests? Ask if this is someone she knows or a cold contact? Where is the recruitment taking place?
- Pick someone to be recruited, who could more or less match the description (e.g., an older woman, a student, a father of three small children, etc.).

## RECRUITMENT INSTRUCTIONS — SETTING UP THE ROLE PLAYS

Quickly take the person you picked to be recruited out in the hall and tell them who they are to play. Help the person think up some realistic objections to being recruited. Then say, “The goal isn’t to be impossible. If the recruiter can find your self-interest, and can describe an activity that is specific, time-limited, and that you could imagine yourself doing, then say yes. If not, try to lead the recruiter to your self-interest and to ways of overcoming your objections.”

- Call the group back to order. Say something like, “Kim is going to recruit John to the school budget campaign.”
- Let the role play run about five minutes or longer if a conclusion seems about to occur. Then debrief.

## RECRUITMENT INSTRUCTIONS — DEBRIEFING THE ROLE PLAYS

- Ask the recruiter how s/he thought it went. What was his/her strategy?
- Ask the recruitee how it went.
- Say to the group, “What did you like best about the job Kim did recruiting John?” Get all positive comments. Cut off negative ones by saying, “I’m looking for what you like best — we’ll talk about what could be improved in a minute.”
- Ask the group, “What did you think could be improved in what Kim did?” Get suggestions for improvement.
- Add your own comments on improvements.
- End by saying a couple of other things that Kim did that were good. Save a good point or two from before and use them now.
- Ask that everyone move their chairs into groups of three. When they have done that, ask one person in each group of three to raise their hand. It doesn’t matter who it is. Say, “You will be the first recruiter. You will recruit the person sitting to your right. The third person will critique the recruitment and then you will switch and that person will recruit you. If there is time, switch again.”



### INSTRUCTOR NOTE

While the recruitments are progressing, walk around and make sure all is going smoothly.

Variation: If you have enough trainers and time, each trainer can take 10 to 15 people and do one role play (two people) at a time in front of the small group — as explained above.

## Module 7: Meetings To Pressure Decision-Makers



### GOALS

By the end of this module, participants should be able to understand:

- Grassroots organizing.
- Examples of power that an action can have.
- That every action must have its power component.
- Secondary targets.
- The importance of selecting the right tone for an action.
- Benefits of regular actions.
- Four steps of planning an action.



### TIME

**Total: 60 minutes**

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### OVERVIEW

Participants should learn that meetings are necessary when “being right” is not getting you what you want. They should understand how to leverage power in a meeting, understand the types of targets, and understand the four steps to a successful meeting.



### MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



### HANDOUTS

- PowerPoint printout
- Checklist for Meetings with Decision Makers
- Meeting with Decision Makers Exercise (Federal, State, or Local from Exercise Kit)



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## INSTRUCTOR NOTE

A meeting with a decision-maker is a brief face-to-face meeting between an organized group of PTA members and a decision-maker or target who can give us what we want. The event is usually held on the decision-maker's turf, often their office, and a specific demand is made by our group. The group expects to get an answer, and expects the answer to be, "Yes."

A meeting is a tactic in the context of a larger campaign. It is also fun. A meeting is one of the tactics we might list in the last column of the strategy chart.

A meeting isn't a symbolic event. To succeed, it must have real power behind it. The hardest thing about planning a meeting is figuring out what power we do have and how to show it at the meeting.



## Introduction

### WELCOME TO MODULE 7: MEETINGS TO PRESSURE DECISION-MAKERS



#### SAY

By the end of this module, you should understand:

- Direct action organizing.
- Examples of power that an action could have.
- Every action must have its power component.
- Secondary targets.
- Tone of the action.
- Benefits of regular action.
- Four steps to planning the action.



#### INSTRUCTOR NOTE

Review the difference between a tactic and a strategy:

- A strategy is the overall plan and it always involves changing power relationships.
- A tactic is one step in carrying out the plan or the strategy.



#### ASK

Has anyone participated in a meeting to pressure a decision-maker? Pick someone to describe the meeting she/he was in. Look for a clue about who to ask when you do introductions and people tell about their victories.

Be prepared to differentiate between a meeting, a media event, and a lobby visit. If you ask two or three participants to describe actions they have been in, you will probably get more media events and lobby visits than true meetings. By lobby visit we mean a smaller number of people bringing information to an elected official or asking about the official's position, but not applying much pressure. Stress that the point is not that one is better than another. They are all useful tools, and it is important to be clear about which tool is being used at any given time.

Share your own example of the power analysis behind a meeting in which you were involved.

### *Examples of Power That a Meeting Could Have:*

- *A politician is made to look unresponsive to voters.*
- *A school superintendent is shown to be losing the confidence of parents and/or teachers BUT only if the bad publicity will lead to the board directing the superintendent to do what you want. Or, if warranted, replacing him/her.*
- *A store manager is made to look unreasonable either to consumers or to the manager of the chain. (The more a business spends in advertising, the more vulnerable it is to having its image attacked.)*

### **Every Action Must Have Its Power Component**

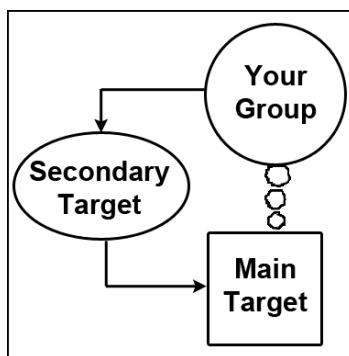
- It is not simply asking, nor is it trying to convince by logic. We have tried those things and failed long before we get to the action stage of the campaign. If, in the beginning of a campaign, we ask for something and get it easily, we assume that we asked for too little. Much later, after the organization has built up a large base and has a reputation for using power, more issues can be settled by negotiations.

### **Secondary Targets**

A meeting is a tactic of medium power. Actions are often used to get to our target in a roundabout way by going after a secondary target, or someone who can make your real target do what you want but over whom you have more power.



### **DISPLAY ON A FLIPCHART OR POWERPOINT**



### **INSTRUCTOR NOTE**

Give a personal example of a meeting you had with a secondary target.



### **SAY**

#### ***The Tone of the Action***

The purpose of the action is to showcase your power, which usually comes from your numbers and your ability to reach even more people who aren't in the room. Often, you can boost your power and have more fun if you go outside of the established channels and do something that is not in the experience of the target. Every institution has its channels for dealing with dissatisfaction. Usually, we are supposed to fill out forms or write letters and wait for answers; that is within the target's experience.

The concept of getting outside the decision-maker's experience is an important one. There is some purely psychological value in making the decision-maker feel uncomfortable. Sometimes elected officials will make a concession just to get rid of us, because we are bothering them. Unfortunately, we can never make them as uncomfortable as thousands of people will become if the government does not adopt the measures PTA says are necessary.

But beyond discomfort there is the principle of changing the rules. If the old rules don't work for us, we have to change them. Under the old rules, our lobbyist or one or two volunteers showed up in the decision-maker's office, had a brief conversation, a lobby visit, and left. If that works, don't change it, but if it isn't working, try getting PTA members to sign 1,000 postcards to the decision-maker in support of the issue you are working on and bring them to your next meeting.

Changing the rules can bring factors into play that we didn't even know existed. It shows that having tried pure logic to convince elected officials we are now going to rely more on the power of numbers. It makes elected officials worry because they don't know what we might do next. If the rules are working for you, then don't change them, but if they aren't working, then don't feel that all you can do is the same thing over and over.

## **EXAMPLES: WHAT IS OUTSIDE THE TARGET'S EXPERIENCE?**

- When you show up in person instead of writing a letter.
- When you make something public that is usually internal, that is outside the target's experience. A consumer advocate was appointed to a state utility policy study commission. At the first meeting, it was announced that the proceedings were strictly confidential. The consumer advocate said, "I represent the public, and it is my duty to repeat every word said here." After that, commission members knew that there would have to be a real debate; they couldn't just cave into industry demands.
- When you pressure individuals and not the institution as a whole, the individuals may realize that they are personally accountable for policies that they can't justify, and they may be more willing to change them. Don't let them say, "Look, I just work here."
- When you demand that a new person or entity assert jurisdiction over an issue, you may be able to bring in someone fresh who isn't publicly committed to a failed policy. When a community group couldn't get the city council to order the cleanup of an area where hazardous materials were stored, they got the area declared a dump and got the zoning board to say the area wasn't zoned for a dump.
- When you play one administrator or politician off against another, you break up the "clubby" atmosphere in which they are used to operating. For example, members of a legislative committee had an unwritten policy of voting with the committee chair. When citizens held the members of the committee individually accountable, the committee members had to justify their votes on the merits of the issue not on tradition.



- When you work with a decision-maker's office it is important to work both with staff and the decision-maker himself/herself. Often we can change policy by working through the staff. Other times we may need to get a meeting with a decision-maker before the staff will begin to take us and our issues seriously.

## GET OUTSIDE THE EXPERIENCE OF THE TARGET



### INSTRUCTOR NOTE

Share your example of going outside the experience of the target.



### SAY

The more you can get outside of the way things are supposed to work, the better chance you have to gain a victory. But—and this is important—what we do must always be within the experience of our own group, otherwise we lose the advantage. For example, when a group of parents, who wanted a city daycare program, brought a large number of children to a meeting with a top city official it really helped them. The official, who was expecting an orderly meeting for which he had prepared all sorts of excuses, was totally thrown off by the kids running around his office. The parents, however, were perfectly comfortable with it. They were used to having the kids play at home, because there was no daycare. The point is to get outside the experience of the target but to stay inside your own experience.

The tone of a meeting needs to be firm enough so that the target knows that the matter won't soon be forgotten. If the target is elected, he or she will be counting the months until election day and wondering how long anyone will remember this meeting and if anyone will actually vote on the basis of this particular issue. How people act during a meeting is a planned tactic. The point is to show that we feel strongly enough that this won't soon be forgotten. Getting angry often will not advance our cause. Instead, it is probably better to keep control of a meeting or do a low-key action that shows the media that our people are more reasonable than the public official.

Whatever the tone of the action is, it should be discussed in advance, and there should be a reason for it.

## BUT BEWARE! THE TARGET IS ALSO TRYING TO GET OUTSIDE OUR EXPERIENCE.

In one experience a city hall staffer took a group of community people into a Victorian era conference room that was so large, so richly detailed, so deeply carpeted and so beautifully furnished that they were all afraid to speak above a whisper.

Their organizer had to suggest that the meeting be moved to the person's private office where the furniture had been made by the Department of Corrections.

## WHAT THE ORGANIZATION GETS OUT OF REGULAR MEETINGS

- **Victories** — Celebrate them!
- **Commitment** — Our volunteers can see the organization working for them and understand what it does.
- **Relations of power become clearer** — In the course of using this tactic, we gain experience, and we learn just what is important to a particular decision-maker. This helps us to win in the future. Some people think that their problems with elected, appointed, or corporate officials stem simply from misunderstandings or typing errors in their letters. Others think that what is important to the decision-maker is that we show that we are right and that we have good research and information. Still others think that the decision-maker gives us what we want, because we are so polite and have such a good relationship with them. Actions give us a chance to test these ideas in practice. What it often comes down to is this: PTA volunteers go as a group to ask for some thing that seems perfectly reasonable and is clearly in the interest of children. We are then refused for bad reasons. This helps to clarify that it wasn't a misunderstanding at all. There really is someone making decisions about our children's lives who is not accountable to us.
- **Elected officials are demystified** — Often, people ask, "What can we do when institutions like the Congress, the legislature, city council or the school board are made up of individuals who have so much power." By using this tactic, meeting with a decision-maker, we can show our members that, yes, the other side has power to be sure, but they can be influenced by us as well as our opponents.
- **Frequent actions keep our organization healthy** — An organization, which is regularly engaging decision-makers, planning strategy, and doing turnout, grows and gains the ability to take on more difficult issues, which is just what we want to do.
- **Publicity** — We often get publicity, which builds membership and fundraising potential.
- **Leadership** — Actions are a good opportunity to build our leadership.
- **Demonstrate power** — Actions allow the organization to demonstrate its power. This is important both for relations with elected officials and administrators, as well as with other organizations.

## FOUR STEPS TO PLANNING THE ACTION

There are four steps to planning the action.



### DISPLAY ON A FLIPCHART OR POWERPOINT

#### Four Steps To Planning The Action:

1. Preparing for the meeting.
2. The meeting itself.
3. The fallback.
4. The follow-up

## 1. PREPARING FOR THE MEETING



### SAY

#### Power Analysis

Start with power analysis and everything we have learned from our research.

Get an appointment. We can learn a lot about how we are regarded by how easy or difficult it is to get an appointment. Ask the question, why did this person agree to meet with us? If we don't have the power to get the appointment, we will probably lose anyway.

Avoid the situation in which someone says, "Oh, the senator is an old school friend. I'll just invite him for coffee, and you can drop in and talk to him." If the meeting is obtained through a personal connection, you won't be able to estimate your strength, and you will be restrained by politeness from saying anything forceful or even requesting direct answers to your questions. The local leader who knows absolutely everyone and can get you in is a great person to have on board when you have no organization, but such people are often the biggest obstacle to grassroots organizing because they can never sort out their personal relationships from their public relationships and want to treat all elected officials as if they were family members.



### INSTRUCTOR NOTE

At a recent training session for another organization, someone said, "Our state rep. would never meet with as many as 10 people."

The trainer responded. "He probably knows that 10 people are all you really have. Try asking him to meet with 50 people and see if he refuses."

The person said, "Oh, we could never get anywhere close to 50 people."

## WHAT DO WE HAVE THAT THE DECISION-MAKER WANTS?



### ASK

Ask what do we have that the decision-maker wants? What can we do or get someone else to do or stop doing so that the decision-maker will make a concession to us?

For example, we can call off our media release if we get our demands now. We can say that if the committee doesn't issue its school discipline report, then we will issue our own report and make them look as if they are trying to hide the problem. Based on our power as an organization, what can we realistically demand and win?



### SAY

#### Get the People Out

Are there special people to have along though not necessarily speaking? If the target is an elected official, perhaps people who made contributions or worked in the campaign should be seen supporting you. If everyone in our group voted for the other candidate and will again, then what would the target gain by giving us anything?

The people who come should be largely from within our own organization or coalition. Everyone should understand the nature of the event. Be careful about outside people who have their own agenda or who may even end up siding with the target.

#### Press

Will having the media present help or hurt? If the focus of the action is to threaten to make something public, then obviously we don't want media present or the threat is gone.

On the other hand, if refusing our demand will put the target in a bad light with people who matter to the target, then the media can be essential to the success of the tactic. For example, if you say, "Senator Jones, do you mean to say that you think healthy snacks in schools are a luxury? Does that have anything to do with the large campaign contribution you received from Snack PAC the political arm of the Junk Food Association?" Whatever the answer, it will have greater repercussions for him/her if made before the media.

## 2. THE MEETING ITSELF

### Case the Place

Make a floor plan showing where the room to which you are going is located in relation to entrances, stairs, elevators, and bathrooms. Check that the building is accessible. There is nothing worse than going in for a meeting and not knowing where to go, or starting for the bathroom and getting lost.

### Rehearse

The spokesperson (there is only one) should role play the meeting with another volunteer or staff person. Try to anticipate what the target will say and have responses ready. PTA leaders, members or other leaders who have spoken with the target in the past can be helpful. Remember, have your facts right, but facts alone won't win it. Always be aware of the source of your power and make it clear during the meeting.

### Showcase Power, Not Frustration

You want to be able to say things like, "Representative Jones, we have 1,500 members in your district, twice the number of votes that elected you to office." Then, tell him/her that voters know you are right about this issue. This is how being right really gives you power.

### Supporting Lines

Participants in a meeting can support the spokesperson by picking up and repeating key lines from the exchange with the target.

*Example:*

*Spokesperson: "Representative Jones, you won't talk about the dismal rate of graduation in our city schools, why not?"*

*Group: "Yes, why not?"*

*The group comes back to that theme several more times, but they need to be alerted in advance.*

### Assign Organizers

Two people should act as organizers for this (and every) event. One stays in front with the spokesperson to keep our leader calm and focused.



### INSTRUCTOR NOTE

Give an account of your experience getting extremely nervous in a public speaking situation. The point is to help the volunteers see that it happens to everyone.

The other organizer stays in the back to ensure that the group is saying supporting lines and hasn't drifted off into acting as if they were watching all of this on TV.



## SAY

### **Agree on a Signal to Leave**

It should come from the spokesperson or the front organizer. It can be a word or a gesture. Once it is given, the whole group must leave. No one is to stay behind to shake hands with the target or discuss the problem of stray cats, no matter how serious that problem is.

### **Assign a Note Taker**

Write down concessions, refusals and quotable quotes. “My job isn’t to worry about how children get to school. My job is to balance the budget.” Try to get the target to sign an agreement on the spot if a concession is made.

When you get a concession, make sure that it is specific. Ask:

- When will it be done?
- How much will be done?
- Who will do it?
- Does anyone else have to approve this decision?
- Don’t accept. “We’ll take care of it, don’t worry.”

## **Call**

Call everyone the night before. Make sure of your turnout.

## **3. THE FALLBACK**

There are two parts to the fallback. Both must be planned in advance.

- What to do when the target doesn’t show up.
- What to do when target says no.

### **When the Target Doesn’t Show Up**

- It is always better that the target shows up. Make an appointment and expect that it will be kept. Often the decision-maker is not far away. Go look in other offices or bathrooms.
- Sitting down and saying that you will wait until she/he comes back sometimes speeds thing up.
- Post demands on the wall mainly for the TV. Having called the media, we need to have something visual.



## INSTRUCTOR NOTE

Give an example from your experience of a time when a target didn't show up but was nearby and was brought out in response to something that the group did.



## SAY

### When the Target Says No:

- We need an agreed upon fallback position, which means asking for less while getting more forceful. (Everyone must agree in advance on what less is. This is where factionalism and wars start.) We say to our city council member, "Please pick up the phone and get us an appointment with the mayor." She/he says, "No!" We say, "O.K., will you write a letter to the mayor and send us a copy?" A fallback is also a face-saver for the target.
- Try saying, "Don't you have the authority to make this decision?" Sometimes they grab at that one, and it gets us an appointment with someone else. (Obviously this is not for use with elected officials when we are discussing how they will vote.)
- Suggest talking it over at the target's house.
- Try to get the target to put the refusal in writing. The idea that their response will be publicized may get you something.

If we don't win, it means that we made a miscalculation. We asked for too much given the amount of real power we had or we didn't make our power explicit. We need to regroup and come up with new demands, more power, or both. Grassroots organizing assumes that the target is rational and will make decisions in his/her self-interest. If the target starts making irrational responses, we both lose. In that case, it might be better to come back another time.

## 4. THE FOLLOW-UP

### Hold a Quick Meeting Outside

Regroup, explain what happened, deal with press, and announce next steps.

### Check on Media Coverage

- See if we can maximize it.
- Carry or email a release to papers. Call radio and TV stations.

### Put the Agreement In Writing

If an agreement was reached, quickly state it in a letter to the target. "Thank you for your agreement to the following terms." Deliver the letter to the target's office. If the content of the letter isn't disputed by the target, it is almost as good as a signed agreement.

### Celebrate Together

### **Later Call and Thank Everyone**

Follow-up on no-shows. Thank new people for coming. Congratulate other leaders.

### **Hold a Formal Debriefing**

Do it within the next week. Critique the meeting. This is how we improve the advocacy skills of our organization. We will discuss the soundness of our strategy, how well the individual tactics moved the strategy forward, and how well we implemented the tactics.





## INSTRUCTOR NOTE

**On the pages that follow are directions for a Decision-Maker Meeting Exercise.**

There are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

## Checklist For Planning a Meeting With an Official (At His or Her Office or "Turf")

**All Levels**

- ☐ Will your action be based on real power? Will it be fun?
- ☐ Is everyone in your group comfortable with the plan? (Is it within the experience of your group?)
- ☐ Will the plan be outside the experience of the target?
- ☐ Are your demands clear and simple?
- ☐ Do you have several fallback demands?
- ☐ Do you have an appointment?
- ☐ Have you scouted the building and made a floor plan? Do you know where to find:
  - ☐ Elevators and stairs
  - ☐ Bathrooms?
  - ☐ Parking or nearest transit stops?
  - ☐ The target's office?
  - ☐ "Hot spot" where your cell phone works - or a pay phone?
- ☐ Can the site accommodate disabled members?
- ☐ Has the group selected who will present information at the meeting? Are people prepared for their roles?
- ☐ Has the group selected who its spokesperson for the action?
- ☐ Have you held a dress rehearsal for the spokesperson and the participants?
- ☐ Have you calculated how you will demonstrate your power? Do you plan to have symbols with you (letters, petitions)?
- ☐ Do you have a good turnout plan for the action, including last-minute reminder phone calls?
- ☐ If you want the media, have they been notified? Have you...
  - ☐ Sent a press release, including a notice of your photo opportunity, a week ahead of time?
  - ☐ Called the daybook a week ahead of time?
  - ☐ Called and emailed the assignment editors the day before the action?
  - ☐ Prepared a release for distribution on the day of the action?
  - ☐ Assigned someone to talk with the media at the event? (your spokesperson may be busy)
- ☐ Have you selected someone to take notes during the meeting and write the confirmation letter to the target?
- ☐ Do you know who will debrief the action with participants and where the debriefing will occur?

## Meetings Exercise

**Local**

### THE ST. FINBAR EDUCATION COALITION MEETS WITH LINDA NAGASHIMA

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

The St. Finbar Education Coalition has been conducting a campaign to reverse the decision to cut bus transportation to all magnet schools in the district. After meeting with individual school board members, you have determined that Hubert Gonzalez is in favor of reversing the decision to cut the bus service and is willing to make the proposal to the school board. At this point two board members are opposed and two are undecided.

Linda Nagashima is undecided. She has agreed to meet with a delegation from the St. Finbar Education Coalition to discuss the issue. Nagashima is very concerned about her next race, which is in November.

### POSITION OF ST. FINBAR MEMBERS ON REINSTATING BUS SERVICE

	School Board Member	Position
1	Hubert Gonzalez	In Favor
2	Jack Gotham	Opposed
3	Eldridge Knowles	Undecided
4	Carol Johnson	Opposed
5	Linda Nagashima	Undecided

## ASSIGNMENT

You have 20 minutes to plan your meeting with School Board Member Linda Nagashima who has agreed to meet at the school district office in one week. Determine whom you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Ms. Nagashima?

After planning, you will have a mock meeting with Board Member Nagashima in which you must convince her that she has more to gain by supporting the proposal than opposing it.

You may make up whatever information you need but keep it within the realm of the possible.

## Meetings Exercise

**State**

### THE FREMONT PTA MEETS WITH SENATOR OLIVIA ROSTEN

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

The Fremont PTA and its coalition partners have been conducting a campaign to stop the funding cuts to public schools in the state. At a recent meeting with a few PTA members, State Senator Rosten refused to take a position on the funding cuts. She claims she is torn about what to do. She wants to uphold her reputation for being fiscally responsible.

State Senator Rosten is truly undecided. She has agreed to meet with a delegation from the campaign to discuss the issue. Rosten is very concerned about her next race, which is in November. You have been informed that the vote will take place in one month.

#### ASSIGNMENT

You have 20 minutes to plan your meeting with Sen. Rosten who has agreed to meet in her district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Sen. Rosten?

Use the Checklist For Planning a Meeting With an Official pages of this handout to help your preparation.

After planning, you will have a mock meeting with Sen. Rosten in which you must convince her that she has more to gain by supporting the PTA and its allies and opposing the funding cuts.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.

## Meetings Exercise

### Federal

### THE PTA COUNTY COUNCIL MEETS WITH CONGRESSMAN ETHAN CHARLES

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

The county council and its coalition partners have been conducting a campaign to amend and pass the Reauthorization of the Childhood Nutrition Act. At a recent meeting with PTA members, Representative Charles said even if he voted for the Reauthorization Act he is concerned that the amendment to regulate competitive foods would be an example of government getting involved in something in which it should not be involved. He repeated the comment he made recently on a radio show that parents should be teaching their children how to make nutritious choices.

While Rep. Charles has been indicating that he will not vote for the amendment, you have heard that he is really worried about his upcoming election. He has said that he has to pay attention to libertarians in the district as he thinks they were the margin of victory in his election. He has agreed to meet with a delegation from the PTA and others in the coalition to discuss the issue. Charles is very concerned about his next race, which is in November. You have been informed that the vote on the amendment will take place in one month.

#### ASSIGNMENT

You have 20 minutes to plan your meeting with Rep. Charles who has agreed to meet in his district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Rep. Charles?

Use the Checklist For Planning a Meeting With an Official to help your preparation.

After planning, you will have a mock meeting with Rep. Charles in which you must convince him that he has more to gain by supporting the PTA and its allies and voting for the amendment.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.

## Module 8: Volunteer Management and Development



### GOALS

By the end of this module, participants should be able to understand:

- Strategies for successful volunteer management in the PTA setting.



### TIME

**Total: 90 minutes**

- Presentation: 60 minutes
- Exercise: 15 minutes
- Debrief: 15 minutes



### MATERIALS NEEDED:

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers
- Handouts
- Flip Chart
- Projector (PPT)



### HANDOUTS

- PowerPoint printout
- Sample Parent Interest Survey
- Volunteer Development Exercise
- Sample Event Planning and Evaluation
- Sample Attendee Event Evaluation
- Volunteer Self-Evaluation



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 8: VOLUNTEER MANAGEMENT AND DEVELOPMENT



#### SAY

By the end of this module, participants should be able to understand:

- Strategies for successful volunteer management in the PTA setting.

In your role as a PTA leader, whether you are leading a committee, serving as president, or chairing a work group, the skills you will need to be able to effectively manage volunteers will not change.

However, PTA leadership changes regularly due to the nature of the democratic leadership model currently used (president, vice-president, etc.). This can create challenges for leaders in new positions because, more likely than not, you have interacted with the same PTA members for quite a while and you are the one that is in a “new” role that requires you to assume a different level of authority. Much like in the work environment when a peer is promoted to a supervisor role, the work relationships usually changes because how we interact with our peers may not always be consistent with how supervisors should act with their employees. As PTA leaders, you face a similar shift in relationships. PTA leaders need to be cognizant of the different roles within the PTA world and the focus placed on leadership.

This module focuses on general volunteer management; however, the techniques covered are valuable tools that a seasoned PTA leader or a new PTA leader can employ in order to create strong team.



#### DISPLAY ON A FLIPCHART OR POWERPOINT:

##### Strategies for Successful Volunteer Management

- Volunteer placement
- Training volunteers
- Evaluate
- Recognize and appreciate contributions



## SAY

### Volunteer Placement

So, you have successfully recruited new PTA members to your team. Now what?

In PTA, we place a lot of emphasis on recruiting new members which is extremely important in order to ensure that our association's strength and significance continue to increase. One area that all volunteer driven organizations need to place a stronger emphasis on is volunteer management. Too often we find ourselves spending a considerable amount of time "putting out fires". Many of the issues associated with PTA drama can be prevented with effective volunteer management.

The first step leaders should take when bringing a new volunteer into the PTA family is to have the volunteer take a Parent Interest Survey. (Handouts of examples) This tool is created by your team and must focus on the events, activities and priorities of your PTA. This is essentially a list of "job opportunities" that can help new volunteers find a role in your PTA. There are a lot of great examples available; however, this tool really needs to be tailored to your situation and needs.

When you are creating your Parent Interest Survey, it is better to have broad categories and then list out types of activities that fall under the category. If you just put the word Advocacy or Legislative Chair on your assessment, more often than not, NO ONE will mark the box. Why? Because Advocacy sounds scary and Legislative Chair sounds very political and not too many of us want to engage in politics. Let's use the example of advocacy for our category.



## ASK

What are some jobs that your PTA might have in this category?



## INSTRUCTOR NOTE

Be sure to write their selections on a flip chart. This list can be quite lengthy and there really is no wrong answer, so encourage attendees to think of specific examples that are "real" in their PTA world such as:

- Writing letters of support for an educational initiative.
- Attending PTA's annual legislative conference.
- Serving as a chaperone for our annual junior/senior trip to the state capital.
- Attending school board meetings.



## SAY

By giving concrete examples, your potential PTA member can get a better picture of the role and expectations for each type of activity. This also allows the volunteer to share what skills and interests they bring to the group and allows PTA leadership to match the volunteer to the activities and interests that best suit the new volunteer. Volunteers who can engage in activities that they enjoy are much more likely to stay involved and remain an active member of the PTA.

The key to any volunteer assessment/survey is for the PTA leadership team to actually read and use the forms. Too often, in our busy routine, we ask parents to complete the forms, we collect them, put them in a folder with the intent of reading them and using them, and then sometime right before the end of the year, we find the folder, and “Uh, Oh....Right?” We must assign ownership of this task to a responsible person within our leadership team. This person should be the membership chair or at least someone on the membership committee. Ideally, someone within your PTA will take the information from the surveys and create a database that can be shared with the leadership team. This will allow everyone on the leadership team access to PTA members who can be called on for specific activities or roles. The goal is to match your PTA members with activities that they are interested in, have experience with and want to be involved in.

*Training volunteers* — Training PTA volunteers is an ongoing process, one that your leadership team must be actively engaged in. New volunteers look to the leadership team for guidance and direction so it is imperative that the leadership team takes an active, role in providing training. National PTA has a variety of training materials available to assist PTAs in training new members and seasoned volunteers. Topics range from advocacy to Reflections and everything in between. Members are encouraged to frequent National PTA's website to keep updated on new training materials and opportunities.

In our PTA world, we take a lot of things for granted. We assume that everyone knows what Reflections is. We are positive that the entire world engages in Leg Con, and surely everyone knows an SP or deals with JBF.

*Example:*

*It is the first PTA meeting of the year and your leadership team is welcoming all your new parents and planning to kick-off a great year. Your team has worked very hard to increase membership by recruiting over 35 new parents to PTA. These parents are new to your school and are excited to be involved in their child's education. You are really excited that you have more than 100 parents in attendance!*

*The President addresses the group and says something like this: “Good afternoon parents, teachers and students. I am so excited to be your PTA president for this year. We want to keep these meetings short to be respectful of your time so we have a lot to cover in a short amount of time. We are planning a strong Reflections program for the year and are really excited that our Leg Chair will be attending Leg Con again in the spring. We have already begun a fundraiser for Founders and will get information to everyone just like last year. We are excited to be working on CCSSI this year and hope all of you will help us promote the initiative. Be sure to sign up for Harvest Day and pick up your cookie packets at the back table. Do not forget to get your JBF form turned in by the end of the week. We also need all of you to plan to rally the school board about the crosswalk and we cannot forget the SAT and ACT are scheduled for October. We really look forward to a great PTA year and we thank you for all that you do. As promised short and sweet.”*



## ASK

What do you think is running through the mind of a brand new member?  
(Allow audience to share a few thoughts.)



## SAY

As we all know there are only so many hours in a day and minutes in an hour and we also all know that everyone is overextended and rushed; however, parents who actually come to PTA meetings have already expressed they are interested, they feel the time is valuable, and they want to help. Make sure that the experience you provide for them matches their expectations. It is imperative that the time they give you is treated in a meaningful way and at the very minimum, they should understand what you are talking about.

Training new volunteers can include preplanned training events; however, training must also include basic “informational language” trainings. As PTA leaders, we must be mindful that everything we say needs to be understood by everyone in the room. Our rule of thumb should be that we always speak as if the person or people we are speaking to do not live in our PTA world. Too many parents would have decided not to attend future PTA meetings if their first experience mirrored our scenario, not because there was not a lot of great work planned, but because they really left not knowing what was planned, why it was planned or even what the president was talking about. This can be intimidating for some, and perceived as disrespectful to others leading both to believe that this is not the place for them.

Further, not all parents are familiar with Robert's Rules. The structure of PTA meetings can be really confusing and daunting to new members. All members of the PTA leadership team should explain the steps of the meetings that pertain to their role throughout the meeting. This should be done in a casual, conversational manner. For instance, “Hi, I am the president of XYZ PTA, and as such, I preside over all PTA meetings. Our treasurer, Sue, handles all funds for our PTA and at each meeting will give a report of our finances. Sue, please share your report.”



## INSTRUCTOR NOTE

*Mid-training Activity* — Have participants break into small groups and rewrite the president's speech. The goal is to develop a speech that is clear, concise and meaningful. Acronyms and programs should be explained. Give the group 5-10 minutes to rewrite the speech. Have one or two groups share their speech, and discuss.

*Evaluate* — Why do we evaluate volunteers? (Allow participants to share a few ideas.)



## SAY

Volunteer evaluations are critical in providing both the association and the volunteer the feedback necessary to improve and grow. It also gives us the opportunity to let our volunteers know the importance of the function they perform. An evaluation process that is well-designed and conducted provides an opportunity for real communication and is an essential element in building and nurturing teamwork.

Evaluations come in many forms from the verbal discussion of an event to a formal process with written documentation. It is up to each PTA to determine which evaluation process works best for their setting.

PTA leadership teams should develop and implement an evaluation process that allows them to gauge the success of events/activities, measure the success of volunteers, and inform the team of concerns/areas that may need improvement.



## INSTRUCTOR NOTE

Share handouts.



## SAY

The handouts are a few examples of evaluation formats that can be adopted by your PTA. When creating evaluation tools and/or methods it is important to strive to be positive and success-focused. Evaluation should never be a negative process but rather should be a process that assists all involved in making PTA a stronger group that is welcoming to all members of the community.

Much like paid staff, volunteers benefit from working with or under the supervision of someone who knows exactly what needs to be done and understands the bigger picture of the work. In PTA the leadership team comprised of volunteers fills that role. Placing someone in charge to supervise volunteers' work can increase the value of their contributions by making sure that tasks are completed correctly, questions are answered, and that your PTA is properly represented through the volunteer's work and attitude. This is especially important when members are representing your PTA out in the community.

This may seem like a no-brainer, but volunteers who consistently complete tasks incorrectly or not complete their assigned work, create a problem for your PTA. Ineffective volunteers can cause all kinds of problems, from tension with school staff members to losing PTA members. While the majority of issues like these can be avoided with screening and proper training and supervision, the time may come when a PTA simply must "fire" a volunteer.

Like any other disciplinary action, firing a volunteer is a delicate task and must be handled with the same care you would use when deciding to let go a staff member. It can be especially strange to discipline or fire someone who has offered his or her time and service for free. The same is true for volunteer board members. PTA leaders are encouraged to work with their National Service Representative (NSR) if these types of situations arise.

*Recognize and appreciate contributions* — Studies show that most volunteers believe the best form of recognition is to know the impact of their work. PTA leaders can demonstrate their appreciation by showing members how their individual efforts make an impact on their school, community, district, state and nation. Knowing that your PTA collected enough canned food to supplement the meals of 100 families ravaged by a tornado is truly rewarding and makes the work of the volunteer “real.” This type of information should be shared in newsletters and reports frequently so that all members can truly appreciate the impact that their PTA makes in the community. Research also reveals that volunteer recognition is tied to volunteer retention rates. Volunteers who feel their contributions are appreciated are more likely to uphold their volunteer commitments.

Good leaders recognize their volunteers from the minute they join a program by treating them as individuals with talents and interests who need to be matched to the right task. Leaders also understand the value of praising effective work at the time it takes place and treating volunteers as important members of the team. This kind of recognition is more important than any social event that might be held.

Today, PTA members are more goal-oriented, tech-savvy and mobile than ever before and the types of positions they seek have evolved to reflect this. Being flexible by offering PTA members the type of roles they want is another effective form of recognition. Volunteer recognition is personal. Getting to know your members as individuals allows you to learn the type of recognition each member would like to receive.

Recognizing where volunteers are in their lifecycle and what role volunteering plays in their life is critical to the recruitment, retention and recognition processes. The conditions, schedule and format of volunteering are important factors for people when selecting an organization; make sure your PTA has roles for all interested volunteers (parents, grandparents, moms and dads, aunts and uncles, teachers, and community members). Some volunteers love the big yearly volunteer recognition event. Others do not care at all and find satisfaction in the work and the feedback from those they work with. Volunteer recognition can be public or private and should be appropriate to the person and his/her contribution. Most of all, it should be honest and demonstrate some particular insight into what that person has done.

Formally recognizing the hard work of your PTA members is an essential part of making them feel appreciated and accomplished. Think of it as a form of compensation for their efforts. There are many ways to formally recognize volunteers and there are options for all budgets, so be creative! Formal recognition can include annual events/dinners and award ceremonies. PTAs are urged to remember to submit outstanding volunteer efforts for state and national award opportunities. Be sure to check with your state leadership for more details on available awards.

Never forget the power of a simple thank you — oral or written.

# HANDOUTS

## XYZ PTA President's Speech Activity

### Scenario:

It is the first PTA meeting of the year and your leadership team is welcoming all your new parents and planning to kick-off a great year. Your team has worked really hard to increase membership by recruiting over 35 new parents to PTA. These parents are brand new to your school and are super excited to be involved with their child's education. You are really excited that you have over 100 parents in attendance! Take a minute to think about how you would feel if this was your first PTA meeting experience.

### The President addresses the group:

*"Good afternoon parents, teachers and students. I am so excited to be your PTA president for this year. We want to keep these meetings short to be respectful of your time so we have a lot to cover in a short amount of time. We are planning a strong reflections program for the year and are really excited that our LegChair will be attending LegCon again in the Spring. We have already begun a fundraiser for Founders and will get information to everyone just like last year. We are super excited to be working on CCSSI this year and hope all of you will help us promote the initiative. Be sure to sign up for Harvest Day and pick up your cookie packets at the back table. Do not forget to get your JBF form turned in by the end of the week. We also need all of you to plan to rally the school board about the crosswalk and we cannot forget the SAT and ACT are scheduled for October. We really look forward to a great PTA year and we thank you for all that you do. As promised short and sweet."*

**Activity:** Within your group rewrite the President's speech. The goal is to develop a speech that is clear, concise and meaningful. Acronyms and programs should be explained. You will have 5-10 minutes to rewrite the speech. Select a spokesperson who will read your speech to the whole group.

**\*\*TIP\*\*** Not all parents are familiar with Robert's Rules. The structure of PTA meetings can be really confusing and daunting to new members. All members of the PTA leadership team should explain the steps of the meetings that pertain to their role throughout the meeting. This should be done in a casual, conversational manner. For instance: Hi, I am the President of XYZ PTA, and as such, I preside over all PTA meetings. Our treasure, Sue, handles all funds for our PTA and at each meeting will give a report of our finances. Sue, please share your report.





# We Need You

## Parent Volunteer Interest Survey 2012/2013

Parent Name(s): \_\_\_\_\_

Student Name(s): \_\_\_\_\_

Phone: (H) \_\_\_\_\_ (C) \_\_\_\_\_ E-mail: \_\_\_\_\_

The best way to reach me is (H) \_\_\_\_ (C) \_\_\_\_ E-mail \_\_\_\_

Please check any of the following volunteer opportunities that are of interest to you. Please note, checking an item here is not a firm commitment on your part- it just lets us know of your interest. Our membership team will contact you with specific volunteer opportunities.

### School-Wide Support

- ☐ Serve as PTA Member
- ☐ Serve on Family/School Partnership Action Team
- ☐ Participate in School-Wide Fundraising
- ☐ Popcorn Friday Coordinator
- ☐ Assist with popcorn Fridays
- ☐ Yearbook Committee
- ☐ Assist with After-School Clubs
- ☐ Maintain and Update Parent Bulletin Board
- ☐ Coordinate Book Swap
- ☐ Help to Plan Special Events (i.e. Book Fair, Family Fun Nights)
- ☐ Assist at Special Events
- ☐ Act as Crossing Guard (AM or PM)
- ☐ Help Monitor Recess

### At Home Support

- ☐ Trim and Count Box Tops
- ☐ Trim Laminated Items for Teachers
- ☐ Baking or Preparing Other Refreshments for Special Events

### Classroom Support

- ☐ Serve as Classroom Parent
- ☐ Assist with Project-Based Learning Activities
- ☐ Reading with small groups or individual children
- ☐ Chaperone a Field Trip
- ☐ Play Math Games with Small Groups or Individual Children

### Community Support

- ☐ Help to Secure Community Partnerships (May include donations of time, expertise, goods or \$)
- ☐ Assist with Community Service Projects

Please tell us about any special interests, talents, skills or expertise that you might like to share with students, teachers or parents, i.e. gardening, scrapbooking, couponing, raising livestock, etc.

# **EVENT EVALUATION & PLANNING FORM**

**Note to Event Chairs:** *In an effort to avoid re-inventing the wheel each year, we'd like to keep good records on the great, the good, the bad, and the ugly from all of our events and efforts going forward. At the conclusion of your event, please complete this evaluation form. Your volunteer list will also help us make sure we don't miss any volunteers when it comes to appreciation-time at the end of the year. Thanks!*

## **1. Event Basics**

Name of Event:

Date:

Day of Week:

Time:

Location:

Chairs:

Basics Feedback:

Was there anything involving the when and where that was particularly positive?

Was there anything involving the when and where that was particularly negative?

## **2. Communications/Promotion**

What tactics (flyers, email, posters, etc.) did you use to promote this event/effort? And what did and did not work well?

What was your timing on communications? Too early? Too late? Any learning for next year?

---

## **3. Event/Effort Execution**

How was participation/attendance? (specifics, if possible):

Was there a cost to attend or participate?

Expenses for running the event (Items Needed & Cost)

Key Steps before Event:

Key Steps during Event:

How Many volunteers did You Have? \_\_\_\_\_ How many volunteers would you have preferred? \_\_\_\_\_

#### **4. Overall feedback.**

Key: Overall comments on successes/failures of the event. Anything you'd do differently? Anything that did or did not work particularly well? Did you have enough help? Suggestions for next year?

---

Any Key feedback as heard from Faculty, Staff or Families?

Should PTA run this event again next year?

Did you have a budget big enough to fund this event?

If no, how much more should be considered for budgeting?

#### **5. Volunteers**

Please list all volunteers who helped in any way with the event. If possible, please also list function.

Volunteer Evaluation Form 2012-13

Thank you so much for volunteering your time to help with this PTA Event.  
We are always looking to improve PTA events, so your feedback is greatly appreciated.  
Thanks, (PTA Development Team)

Your Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name of Event: \_\_\_\_\_

1. What is your overall assessment of how the event flowed?
  
2. What was your role (responsibilities/duties)?
  
3. Were you set up to succeed in your job with guidance, instructions, materials, etc.? If not, what more could have been done to help you?
  
4. If you were instructing the next person to do this job, what would you tell him/her?
  
5. How could events like this be improved in the future?
  
6. Anything else that you'd like to say?

Thank you for taking the time to fill out & reply back. You are helping the PTA create successful events.

## Volunteer Self Evaluation Form

The purpose of this appraisal is to maintain good communication with our PTA members and to improve your PTA experience as well as improving the services we provide.  
As part of our continuous improvement program we request that you complete this self appraisal and bring it to discuss at our appointment on *(insert appointment time)*.....

*Signed Membership Chair*.....

Volunteer Name:

Office held:

Date of appraisal:

What do you enjoy most in your role with PTA?

Which part of your PTA role do you feel you do well?

Which part of your PTA role do you feel you could do better?

Are there any factors that make your role easy or difficult?

Are there any aspects of your role in which you would benefit from further support/training?

Do you wish to:

- continue in this role?
- develop this role further?
- vary your role?
- act as a buddy for new volunteers?
- move into a different role?
- take on greater responsibility?
- contribute less/more time?

Any further comments?

Signed: Volunteer:.....

Date Developed \_\_\_\_\_

Signed \_\_\_\_\_

Date Reviewed \_\_\_\_\_

Signed \_\_\_\_\_

## Module 9: Presentation Skills and Public Speaking



### GOALS

By the end of this module, participants should be able to understand:

- Strategies for becoming a better public speaker.
- Strategies for effective presentations.
- Strategies for calming nerves.



### TIME

**Total: 30 minutes**



### OVERVIEW

The focus of this session is to help people think more strategically about their public speaking and presentation skills in order to improve their overall effectiveness in relaying information to others about advocacy skills and the Common Core State Standards.

PTA leaders have the opportunity to share the PTA messages to many groups. Additionally, PTA leaders are called upon to use public speaking and presentation skills on a regular basis, even if the leaders are not comfortable speaking in public.



### MATERIALS NEEDED

- Easel paper
- Masking tape
- Dark markers



### HANDOUTS

- PowerPoint printout
- Presentation Checklist



## EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
  - Computer with PowerPoint software
  - LCD projector
  - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
  - Portable speakers for videos



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## Introduction

### WELCOME TO MODULE 9: PRESENTATION SKILLS AND PUBLIC SPEAKING



#### SAY

By the end of this module you should understand:

- Strategies for becoming a better public speaker.
- Strategies for developing stronger presentations.
- Strategies for calming nerves.

Chances are that you will have to speak in public as part of your role with PTA. While this can seem intimidating, the benefits of being able to speak well outweigh any perceived fears.

In this session we are going to discuss strategies for becoming a better public speaker, delivering effective presentations and calming nerves that are associated with public speaking.

Even if you don't need to make regular presentations in front of a group, good public speaking skills are useful for all aspects of your life, work and home. For example, you might have to talk about your organization at a conference, make a speech after accepting an award or provide training for new PTA members. You might be asked to make a speech at a friend's wedding, give a eulogy for a loved one or inspire a group of PTA volunteers at a meeting. In short, being a good public speaker can enhance your reputation, boost your self-confidence, and open up countless opportunities.

However, while good public speaking skills can open doors, poor speaking skills can close them. For example, your boss might decide against promoting you after sitting through a poorly-delivered presentation. You might lose a valuable new PTA member by failing to connect with a prospect during a PTA sales pitch or you could make a poor impression with your new team because you trip over your words and don't look people in the eye.

Make sure that you learn how to speak well!



#### ASK

Who is afraid of public speaking? (Take a few minutes to discuss.)





## SAY

Well, we are not alone! Some surveys and research results show that most people are terrified of speaking in front of a live audience, as you can see in this list of the top 10 fears globally!



## DISPLAY ON A FLIPCHART OR POWERPOINT:

### Top 10 Global Fears

1. Public speaking or stage fright
2. Death and end of life
3. Spiders and other arachnids creatures
4. Darkness and twilight
5. Heights, altitude or elevations
6. People or social situations
7. Flying in airplanes
8. Open spaces and squares
9. Natural thunder and lightning
10. Confined spaces or small rooms



## SAY

Chances are that you will at some point have to speak in public as part of your role with PTA. While this can seem intimidating, the benefits of being able to speak well outweigh any perceived fears. To become a better speaker, use the following strategies:



## DISPLAY ON A FLIP CHART OR POWERPOINT:

- Planning
- Practice
- Engaging Your audience
- Body Language
- Thinking Positively
- Calming Nerves



## SAY

*Planning* — Make sure that you plan your communication appropriately to think about how you'll structure what you're going to say from your opening words all the way through to your closing statement.

Think about how important a book's first paragraph is; if it doesn't grab you, you're likely going to put it down. The same principle goes for public speaking: from the beginning, you need to intrigue your audience. You will notice that in each of the PTA modules we have included "attention grabbers" throughout the scripts. These can include quotes from famous people on the topic, statistics that emphasize your point or funny anecdotes that lighten the mood.

You also want to develop your closing remarks. What you leave your audience with should summarize what has been covered, the key point or points you want them to take away and stress any action you want them to take after the session.

Planning also helps you to think on your feet. This is especially important for unpredictable question and answer sessions or last-minute communications.

And finally, it is very important that you make presentations “your own” even if you have been provided with all the written tools including a script. If your audience does not feel like you are genuinely knowledgeable or excited about the topic, they will not engage with you or find your material valuable.

## Practice

There's a good reason that we say, “Practice makes perfect!” You simply cannot be a confident, compelling speaker without practice.

To get practice, seek opportunities to speak in front of others. As a PTA member, you have the perfect audience in your PTA family. Your local PTA is a great place to develop your public speaking skills because you already know your audience, are familiar with the material and your surroundings and you should have a higher comfort level. The first step is by volunteering to speak at meetings.

When you are planning to deliver a presentation or a prepared speech, create it as early as possible. The earlier you put it together, the more time you'll have to practice. This is not the time to wait until the last minute!

Practice it plenty of times alone, using the resources you'll rely on at the event, and, as you practice, tweak your words until they flow smoothly and easily. Then, if appropriate, do a practice run in front of a small audience: this will help you calm your fears and make you feel more comfortable with the material. Your audience can also give you useful feedback, both on your material and on your performance.

Whenever possible, record your presentations and speeches. You can improve your speaking skills dramatically by watching yourself later, and then working on improving in areas that did not go well. As you watch, notice any verbal stalls, such as “um” or “like”, and practice replacing those verbal stalls with brief pauses. Look at your body language: are you swaying, leaning on the podium or leaning heavily on one leg? Are you looking at the audience? Did you smile? Did you speak clearly at all times? Pay attention to your gestures. Do they appear natural or forced? Make sure that people can see them, especially if you're standing behind a podium.

Last, look at how you handled interruptions, such as a sneeze or a question that you weren't prepared for. Does your face show surprise, hesitation, or annoyance? If so, practice managing interruptions like these smoothly so that you're even better next time.

## Engaging Your Audience

When you speak, try to engage your audience. This makes you feel less isolated as a speaker and keeps everyone involved with your message. If appropriate, ask leading questions targeted to individuals or groups, and encourage people to participate and ask questions.

Keep in mind that some words reduce your power as a speaker. Think about how these sentences sound:

*"I just want to add that I think we really need the Common Core State Standards."*

*"I just think this plan is a good one."*

Phrases such as "Just" and "I think" limit your authority and conviction. Don't use them.

*"I believe in the Common Core State Standards because they are clearer and more focused."*

*"I am confident that this plan will increase enrollment and allow our members stronger advocacy efforts."*

Notice the increase in authority and conviction?

A similar word is "actually." When you use "actually," it conveys a sense of submissiveness or even surprise.

*"Actually, I'd like to add that we were under budget last year."*

By removing actually your message is clear, concise and stresses confidence:

*"We were under budget last year."*

Also, pay attention to how you're speaking. If you're nervous, you might talk quickly. This increases the chances that you'll trip over your words or say something you don't mean. Force yourself to slow down by breathing deeply. Don't be afraid to gather your thoughts; pauses are an important part of conversation, and they make you sound confident, natural, and authentic.

Finally, avoid reading word-for-word from your notes. When you read, you are not looking at your audience so you will not be seen as an engaging speaker. Additionally, when you try to read from your notes and look up occasionally, you appear awkward and come across as less confident.

Instead, make a list of important points on index cards and use bullet points. For instance for this workshop, I know I need to cover each of the strategies: planning, practice, engaging your audience, body language, thinking positively, and calming nerves.

Here is a sample index card that allows you to engage with your audience:



## DISPLAY ON A FLIP CHART OR POWERPOINT:

### Planning

- Attention grabbers
- Closing summation
- Plan for Q&A
- Making it your own



## SAY

### Body Language

Your body language will give your audience constant, subtle clues about your inner state. If you're nervous or if you don't believe in what you're saying, the audience will know by how you present yourself. Research has shown that up to 94% of communication is non-verbal!



## ASK

What are some examples of non-verbal communication that you have seen during presentations? (Discuss both positive and negative examples.)

*Examples:*

*Pay attention to your body language: stand up straight, take deep breaths, look people in the eye and smile. Don't lean on one leg or use gestures that feel unnatural. Don't cross your arms.*



## SAY

Many people prefer to speak behind a podium when giving presentations. While podiums can be useful for holding notes, they put a barrier between you and the audience. They can also become a "crutch," giving you a hiding place from the dozens or hundreds of eyes that are on you.

Instead of standing behind a podium, walk around and use gestures to engage the audience. This movement and energy will also come through in your voice, making it more active and passionate.

Don't forget to SMILE! When you smile, your audience is more inclined to forgive nervousness and they will be rooting for you.

*Think Positively* — Positive thinking can make a huge difference to the success of your communication because it helps you feel more confident.

Fear makes it all too easy to slip into a cycle of negative self-talk, especially right before you speak.

Self-sabotaging thoughts such as, “I’ll never be good at this!” or “I’m going to fall flat on my face!” lower your confidence and increase the chances that you won’t achieve what you’re truly capable of.

Use affirmations and visualization to raise your confidence. This is especially important right before your speech or presentation. Visualize giving a successful presentation, and imagine how you’ll feel once it’s over and when you’ve made a positive difference for others. Use positive affirmations such as, “I am the local expert on this topic!” or “I am going to do well!”

Don’t forget to smile!



## DISPLAY ON A FLIPCHART OR POWERPOINT:

“The way you overcome fear and shyness is to become so wrapped up in something that you forget to be afraid!” - Lady Bird Johnson



## SAY

**Cope With Your Nerves**



## ASK

How often have you listened to or watched a speaker who really messed up?



## SAY:

Chances are the answer is “not very often.” When we have to speak in front of others, we can envision terrible things happening. We imagine forgetting every point we want to make, passing out from our nervousness, or doing so horribly that we will never be asked to speak again. But those things almost never happen! We build them up in our minds and end up more nervous than we need to be.

Make an effort to stop thinking about yourself, your nervousness, and your fear. Instead, focus on your audience: what you’re saying is “about them.” Remember that you’re trying to help or educate your audience in some way, and your message is more important than your fear. Concentrate on the audience’s wants and needs, instead of your own.

Crowds are more intimidating than individuals, so think of your speech as a conversation that you’re having with one person. Although your audience may be 100 people, focus on one person at a time, and talk to that person as if he or she is the only one in the room. You should seek several people within the audience to focus on, ideally strategically located around the room.



## DISPLAY ON A FLIPCHART OR POWERPOINT:

### Steps for Conquering Your Presentation Nerves

- Step 1 – Know your audience
- Step 2 – Know your material
- Step 3 – Structure your presentation
- Step 4 – Calm yourself from the inside



## SAY

Notice we didn't say to get rid of your nervousness. This is because presenting is not a natural activity. Even the most practiced presenters get a bit nervous. The point is this: your nervous energy can be used to your advantage. When you are in a heightened state from the adrenaline that is being pumped into your body, you can use that energy to communicate enthusiastically, convincingly, and passionately. The key is to decrease your level of nervousness so you can use your energy on these positive activities, not on trying to control your nerves. The more uncertain you are, the more nervous you will be.

**Step 1 — Know Your Audience:** If you are asked to speak to a group, make sure to take time to find out a few things beforehand:

- Ask who will be in the audience? (Are they parents, teachers, members of the business community, school board members, etc.)
- What do they already know about the topic? Are they experts on the topic? Will this be brand new information?
- Is there a meeting or event planned before and/or after your talk? What other topics will be discussed? What is the agenda for the meeting? How much time do you have?

The more confident you are that you are presenting useful and interesting material for your audience, the less nervous you will be overall. A great tip is to greet audience members at the door and do a quick survey of why they are there and what they expect. This really helps you build a rapport with the group.

**Step 2 — Know Your Material:** Nothing is worse for nerves than trying to give a presentation on a topic that you do not know! Our modules will provide you with information and tools for each of the topics; however, it is on you to make sure that you take time to read the material and become familiar with each topic. Remember: Your audience will ask you questions and will look to you as the expert.

Another important point to remember is that you cannot possibly cover everything you know in your presentation. That would probably be long and boring. So select the most pertinent points from your subject base and then supplement with other material if time allows. A great tip is to make your material interesting and memorable, include occasional questions to the audience to encourage audience participation. This enhances the learning experience and gives you a break from presenting. It also allows you deliver your information in a more conversational manner, which is often more believable.

**Step 3 — Structure Your Presentation:** A common technique for trying to calm nervousness is memorizing what you intend to say; however, all this does is make your delivery sound like it is coming from a robot. If you miss a word or draw a blank, your whole presentation is thrown off and then your nervousness gets worse. It is far better to structure your presentation so that you give yourself clues to what is coming next.

- Have a set of key phrases listed on a cue card.
- Refer to these phrases to trigger your mind as to what is coming up next.
- If you're using slides, use these key phrases in your transitions.

This approach helps you control your own uncertainty about whether you will remember what you want to say and the order you want to say it.

**Step 4 — Calm Yourself from the Inside:** Nervousness causes physiological reactions, which are mostly attributed to the increase of adrenaline in your system. You can counteract these effects with a few simple techniques:

*Practice deep breathing* – Adrenalin causes you to breathe shallowly. By breathing deeply your brain will get the oxygen it needs and the slower pace will trick your body into believing you are calmer. It also helps with voice quivers, which can occur when your breathing is irregular.

*Drink water* – Adrenalin can cause a dry mouth, which in turn leads to getting tongue-tied. Have a glass of water handy. Take sips occasionally, especially when you want to emphasize a point.

*Smile* – This is a natural relaxant that sends positive chemicals through your body.

*Use visualization techniques* – Imagine that you are delivering your presentation to an audience that is interested, enthused, smiling, and reacting positively. Cement this positive image in your mind and recall it right before you are ready to go on.

Here are a few more calming presentation tips:

- Press and massage your forehead to energize the front of the brain and speech center.
- Just before you start talking, pause, make eye contact, and smile. This last moment of peace is very relaxing and gives you time to adjust to being the center of attention.
- Speak more slowly than you would in a conversation, and leave longer pauses between sentences. This slower pace will calm you down, and it will also make you easier to hear, especially at the back of a large room.
- Move around during your presentation. This will expend some of your nervous energy.
- Remember that the audience is there to get some information and it is your job to put it across to them.

When it comes to presenting, nerves are inevitable. Letting them get the better of you is not. You need to develop a strategy for taking the focus off your nervousness and putting that energy to positive use. By controlling as much of the uncertainty as you can, you increase your confidence in your ability to deliver an excellent presentation. This confidence then counteracts your nerves, and you create a positive cycle for yourself.

Nerves are not your enemy and you don't have to fear public speaking. For your next presentation, be knowledgeable, be well-practiced and prepared, and try out some physical relaxation techniques. Amaze yourself and impress your audience with your calm and cool delivery of a great presentation.



# HANDOUTS

## **Planning**

**How much does your audience know about the presentation's subject? (Make sure that your presentation matches their knowledge level – don't make it too complicated or too simple for their needs.)**

**Where and how will you present (indoors, outdoors, standing, sitting)? Will this affect how you need to prepare?**

**What is going on before and after your presentation? Do you need to adjust your presentation?**

**How long do you have? Will your presentation fit in the time allotted?**

**Are you knowledgeable enough about the topic that you're covering in your presentation? If not, how will you build this knowledge?**

**Can you visit the presentation room beforehand to get a feel for it?**

**Does the presentation room have everything that you need? (For example, electrical supply, Internet access, projector screen, and so on.) Do you need to bring your own equipment? (You should always bring your own equipment even if you don't use it, as a back-up)**

**Do you want to inspire your audience to act? If so, how are you going to do this?**

**Are you presenting as part of a team? How will you divide up the presentation?**

**Have you scheduled planning and practice time well in advance?**

**Have you prepared an evaluation?**

**Do you need to provide your own handouts and evaluations? How many copies do you need? If someone else is making them, how will you get them the material?**

**How will you know they are ready?**

## **Content**

**Does your introduction grab your audience's attention? And does it need to explain your objectives?**

**Do you follow this by clearly defining the points of the presentation?**

**Are the main points in a logical sequence?**

**Do these points flow well?**

**Do the main points need support from visual aids or props?**

**Is your presentation too complex? (It's easy to go overboard, especially when you want to impress - remember, keep it simple and focused.)**

**Does your presentation contain any jargon or acronyms? (These can be confusing for many people, so make sure that you define or eliminate jargon/acronyms from your presentation.)**

**Does your presentation's conclusion summarize the presentation clearly and concisely?**

**Is the conclusion strong?**

**Have you tied the conclusion to the introduction?**

**Have you practiced your presentation standing (or sitting, if applicable), paying close attention to your body language and posture?**

**Have you rehearsed often enough to be able to speak smoothly and fluently?**

**Have you practiced your presentation in front of others? Your practice audience can give you valuable feedback about your presentation.**

## **Power Point Presentation**

**Is the power point easy to read/view and easy to understand?  
Is it tied into the points that you're trying to communicate?**

**Do your slides all look consistent?  
Have you used the same fonts throughout? Are the slides easy to read? Can they be seen easily from all areas of the room?**

**Have you included too much wording? (Remember, slides are meant to support points or concepts, not replace them. So, no sentences or paragraphs!)**  
**If you're representing an organization, do your visual aids and slides match your organization's branding?**

**Do you have all of the equipment you need? Laptop, projector, all cords needed to hook it all up? Do you have spare projector bulbs, just in case your existing bulbs blow? Do you have speakers if you plan to show a video?**

**Have you prepared contingency plans in case your audio/visual equipment fails? Do you have a printed copy so you can use it in the event Power point is not an option?**

**Be sure to save your presentation on your laptop, a USB drive and email it to yourself, just in case!**

**Even if all equipment is supposed to be provided; BRING YOUR OWN.  
You never know!**

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## **The Day of your Presentation**

**Do you have your slides, notes, and other visual aids in the right order?**

**Are you dressed and groomed appropriately? (Make sure that this is in keeping with your audience's expectations.)**

**Have you left enough time for travel and setting up?**

**Have you checked your visual aids to ensure that they're working, and that you know how to use them?**

**REMEMBER: Did you provide a sign in sheet? Be sure to remind everyone to sign in. (Ideally, your sign in sheet includes printed name, email, phone number)**

**Do you know how to deal with nervousness? (Presentation nerves are very common, so learn how to manage presentation nerves to use that energy to your advantage.)**

**REMEMBER: Greet participants as they arrive if possible, helps to establish rapport.**

**REMEMBER: During your presentation, make and maintain eye contact with members of your audience?**

**Have you made sure that your audience understands everything that you've covered? (Invite them to ask questions if you're unsure.)**

**REMEMBER: Hand out evaluations Have you asked for feedback from your audience? Is there anything that you could learn, to improve your next presentation?**

**Do you need to follow up with any of your audience? Put a star by their name on your sign in sheet.**

# ALL EXERCISES FOR PRINTING

## Checklist For Media Events

### All Levels

- ☐ Have the date, time, and place been cleared with all the speakers?
- ☐ Are there other media conflicts (e.g., another major event or press conference)?
- ☐ Is the room large enough?
- ☐ Will you need a public address system?
- ☐ Have volunteers been recruited to set up and clean up the room before and after the event?
- ☐ Do you plan to serve refreshments? If so, have people been asked to bring them?
- ☐ Who is sending the media advisory?
- ☐ Who is making follow-up phone calls?
- ☐ Is there a script available for those making follow-up phone calls to the media?
- ☐ Are visuals, charts, or graphs needed at the press conference?
- ☐ Who is writing each person's presentation? Are there good quotable sound bites?
- ☐ Do you need translators?
- ☐ Is a time set for speakers to rehearse their presentations and answers to the anticipated questions?
- ☐ Are materials being prepared for the press kit?
  - ☐ Press release
  - ☐ Background information on speakers
  - ☐ Fact sheet
  - ☐ Organizational background
  - ☐ Copies of speakers' statements
- ☐ Is someone drafting a question and answer sheet for anticipated questions at the press conference?
- ☐ Will your organization's name be projected well through signs, posters, buttons, and so forth?
- ☐ Is someone assigned to hang the banner? This can take a while.
- ☐ Is there a podium sign?
- ☐ Who will greet the media and staff the sign-in table?
- ☐ Is someone in your group going to take photos & videos?
- ☐ Who is assigned to assist the speakers with details at the press conference?
- ☐ Who will send releases to those who don't attend the press conference?
- ☐ Who will call reporters who don't attend, but will need the information immediately in order to use it?
  - Are volunteers assigned to watch for stories in various media?
- ☐ Will thank you notes be sent to all spokespersons and volunteers?

## Checklist For Planning a Meeting With an Official (At His or Her Office or "Turf")

**All Levels**

- ☐ Will your action be based on real power? Will it be fun?
- ☐ Is everyone in your group comfortable with the plan? (Is it within the experience of your group?)
- ☐ Will the plan be outside the experience of the target?
- ☐ Are your demands clear and simple?
- ☐ Do you have several fallback demands?
- ☐ Do you have an appointment?
- ☐ Have you scouted the building and made a floor plan? Do you know where to find:
  - ☐ Elevators and stairs
  - ☐ Bathrooms?
  - ☐ Parking or nearest transit stops?
  - ☐ The target's office?
  - ☐ "Hot spot" where your cell phone works - or a pay phone?
- ☐ Can the site accommodate disabled members?
- ☐ Has the group selected who will present information at the meeting? Are people prepared for their roles?
- ☐ Has the group selected who its spokesperson for the action?
- ☐ Have you held a dress rehearsal for the spokesperson and the participants?
- ☐ Have you calculated how you will demonstrate your power? Do you plan to have symbols with you (letters, petitions)?
- ☐ Do you have a good turnout plan for the action, including last-minute reminder phone calls?
- ☐ If you want the media, have they been notified? Have you...
  - ☐ Sent a press release, including a notice of your photo opportunity, a week ahead of time?
  - ☐ Called the daybook a week ahead of time?
  - ☐ Called and emailed the assignment editors the day before the action?
  - ☐ Prepared a release for distribution on the day of the action?
  - ☐ Assigned someone to talk with the media at the event? (your spokesperson may be busy)
- ☐ Have you selected someone to take notes during the meeting and write the confirmation letter to the target?
- ☐ Do you know who will debrief the action with participants and where the debriefing will occur?



## Strategy Exercise

**Local**

### THE CAMPAIGN TO RESTORE BUS SERVICE TO ST. FINBAR MAGNET SCHOOLS

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving a local school district.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

St. Finbar is a fictitious city in the U.S. The school system, including charter schools, serves 135,000 students distributed between 119 elementary schools, 24 middle schools and 30 high schools. The annual school budget is \$1.2 billion, which was inadequate before the economic downturn and has typically become less adequate as costs have risen. At the same time income from taxes has declined. The students are majority non-White. Latinos make up 44% of the student population, followed by non-Hispanic White students at 25%, African Americans at 13% and the remaining 15% are largely Asian.

#### THE PROBLEM

The school board has announced, in a moment of ill-advised budgeting frenzy that to save \$10 million dollars, school bus service for all 25 magnet schools will be eliminated starting in September. The board's vote was unanimous. It is now February. The absence of bus service will be a major blow to your school as 57% of the students now ride the bus and many families can't afford to bring their children to school by other means.

The school board, which has final decision-making power over the budget, consists of five members who are elected to four-year terms on a staggered basis. The at-large school board election takes place at the same time as the City Council election. While almost 800,000 (54%) voted in the last City Council election, only 500,000 of those voted in the school board race (lower down on the ballot).

## YOUR ORGANIZATION

You are members of the PTA at the Linguistic Institute, an elementary magnet school devoted to graduating truly bilingual students. Your school has over 800 students. Slightly more than half of them qualify for free or reduced-cost lunches, indicating that the school has diversity of income as well as race. The Institute is known as a 100% magnet, meaning that none of the students attend because it is their local school. All are in the magnet program.

Your PTA has four officers and five board members plus a class parent in each class. Usually not more than 30 people show up for PTA meetings but since the bus cuts were announced, more than 100 people, have been coming.

## THE SCHOOL BOARD

Name	Notes
Hubert Gonzalez  Won Last Election By 72%  Running in Next Election: Yes	Mr. Gonzalez has a background as a community organizer, working to revitalize low-income neighborhoods and creating networks for parents of pre-school aged children. He served five years as president of the Relational Organizing Institute and has also worked for the Local Efforts Support Corporation, the Vomer science and Education Foundation, and as a consultant for the Washington Heights Community Development Corporation. In the field of labor relations, he has served as St. Finbar regional organizer for both the United Domestic Workers and United Healthcare Workers. Mr. Gonzalez serves as a board member of the St. Finbar Cooperative Charter School.
Jack Gotham  Won Last Election by 54%  Running in Next Election: No	Jack Gotham, Ph.D., was elected to the Board in 2008. He earned a Bachelor of Arts in Psychology at Sitzler College and a Masters in Psychology and Ph.D. in Clinical Psychology at U.S. National University.  Once in St. Finbar, Dr. Gotham taught Spanish at a language institute where he later became director. Dr. Gotham is currently a clinical psychologist in private practice, working with children, adolescents and adults. As a parent, Dr. Gotham has been a member of the Larson Elementary School Site Council, a classroom and PTA volunteer at Sprack Elementary. He and his wife live in Multiversity City, a subdivision of St. Finbar. Their three grown children all attended St. Finbar Unified schools.

Name	Notes
<p>Eldridge Knowles</p> <p>Won Last Election By 59%.</p> <p>Running in Next Election: Yes</p>	<p>Eldridge Knowles was first elected directly from the classroom to the board to represent District C in 1990. He served as board president and vice-president during his first term. Reelected in 1994, 1998, 2002, and 2006, he has been an active delegate to both the St. Finbar County School Boards Association and the State School Boards Association. On the national level, Mr. Knowles has served as the board's representative on the Council of Great City Schools. Mr. Knowles attended St. Finbar City Schools in Point Loma and he received his bachelor's and master's degrees in business from St. Finbar State University. He has taught for more than 36 years. He also served as a counselor, resource teacher, and curriculum administrator, and he taught business at St. Finbar City College for 10 years.</p>
<p>Carol Johnson</p> <p>Won Last Election By: 80%</p> <p>Running in Next Election: No</p>	<p>Carol Johnson was elected to the Board of Education in November 2004 and re-elected to her seat in November 2008.</p> <p>Ms. Johnson was born and raised in Smithfield, North Carolina, and graduated from Smithfield-Selma Senior High School. After graduation, she joined the U.S. Navy and served for 21 years. During her career in the Navy she rose to the rank of Senior Chief, and managed Navy Health clinics. During her military career, Ms. Johnson earned a Bachelor of Health Science from George Washington University. After her retirement from active duty in 1995, Ms. Johnson moved to St. Finbar to begin her second career in public education. From 1995 to 2003, Ms. Johnson taught at Bay Park Elementary School and served on various school and neighborhood committees.</p>
<p>Linda Nagashima</p> <p>Won Last Election By: 60%</p> <p>Running in Next Election: Yes</p>	<p>Linda Nagashima was elected to the board in 2002 and 2006. She holds a bachelor's degree in linguistics and english literature, as well as a certificate in applied linguistics for teaching English as a second language. She received her law degree from the University of St. Finbar, where she worked as a member of the administration. She served as vice-chair of the Union of Pan Asian Communities, as well as serving on boards of other community organizations. She and her husband, Kotaro Nagashima, have two sons, one who attends school in the St. Finbar Unified School District. They have lived in the city for 25 years.</p>

## Strategy Exercise

**Local**

### ASSIGNMENT



#### TIME

**Total: 30 minutes**

From the above list of elected officials, choose one to be the initial decision-maker whose support you will first attempt to win and whom you think can persuade others to get on board. Be prepared to justify your choice. Make a strategy chart on easel paper, one column to a sheet. The chart should show how you intend to put pressure on the decision maker you have chosen. When you are finished with the Tactics column, number the tactics in the order in which you will use them. Choose someone to report to the whole group.

You can make up any additional information you need as long as it is both possible and probable.

## Coalition Exercise

**Local**

### FORMING THE ST. FINBAR EDUCATION COALITION

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a local issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to get the bus service restored to all magnet schools in the district the Linguistic Institute PTA has decided that it must involve other organizations to build enough power to be successful. School Board Member Hubert Gonzalez has agreed to introduce the proposal. You are the leaders of the PTA, and have decided to form the St. Finbar Education Coalition. You are considering asking the following groups to join:

- The Greater St. Finbar Small Business and Manufacturers Association
- St. Finbar chapter of the State Senior Citizen Federation
- St. Finbar Interfaith Committee
- The St. Finbar branch of the NAACP

## Coalition Exercise

**Local**

### ASSIGNMENT



#### TIME

**Total: 20 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed St. Finbar Education Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the St. Finbar Education Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the Linguistics Institute PTA.

## Media Exercise

Local

### MEDIA AND THE CAMPAIGN TO RESTORE BUS SERVICE TO ST. FINBAR MAGNET SCHOOLS

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA at the Linguistic Academy in St. Finbar, working to save the busing program for magnet schools. Your PTA unit and others brought a large group of parents to the school board meeting, and a number of them were able to give testimony about how their children would be impacted if the busing were eliminated. The school board just ended their meeting without making any decision. The board members are clearly nervous about so many parents showing up, but they keep saying there just is not enough money. They postponed the decision for one month.

## Media Exercise

### Local

### ASSIGNMENT

#### Exercise 1

As you leave the school board meeting, a reporter thrusts a microphone at you and asks for a comment.

What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after the school board meeting, you and three or four other parents are on a public affairs talk show on the local public radio station.

The president of the school board was on just before you, and he said that there simply is not enough money. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.



## Meetings Exercise

**Local**

### THE ST. FINBAR EDUCATION COALITION MEETS WITH LINDA NAGASHIMA

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

The St. Finbar Education Coalition has been conducting a campaign to reverse the decision to cut bus transportation to all magnet schools in the district. After meeting with individual school board members, you have determined that Hubert Gonzalez is in favor of reversing the decision to cut the bus service and is willing to make the proposal to the school board. At this point two board members are opposed and two are undecided.

Linda Nagashima is undecided. She has agreed to meet with a delegation from the St. Finbar Education Coalition to discuss the issue. Nagashima is very concerned about her next race, which is in November.

### POSITION OF ST. FINBAR MEMBERS ON REINSTATING BUS SERVICE

	School Board Member	Position
1	Hubert Gonzalez	In Favor
2	Jack Gotham	Opposed
3	Eldridge Knowles	Undecided
4	Carol Johnson	Opposed
5	Linda Nagashima	Undecided

## ASSIGNMENT

You have 20 minutes to plan your meeting with School Board Member Linda Nagashima who has agreed to meet at the school district office in one week. Determine whom you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Ms. Nagashima?

After planning, you will have a mock meeting with Board Member Nagashima in which you must convince her that she has more to gain by supporting the proposal than opposing it.

You may make up whatever information you need but keep it within the realm of the possible.

## Strategy Exercise

State

### THE CAMPAIGN TO INVEST IN NEW LEIF'S CHILDREN

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the state legislature.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

New Leif is a mythical state in the United States named after the Norse explorer Leif Erickson. Like most states, it has been hit hard by the current recession. Over the last three years, the state legislature has repeatedly cut the education budget. It is January and the legislature has proposed cutting \$2 billion more from the state budget. The legislature will be voting on the cuts in April.

All 59 school districts in the state have been affected by the cuts, which have reached directly into the classroom (e.g., cuts in staffing including teachers, teacher's aides, and hall monitors; enrichment programs including music, art, field trips, etc; transportation; health and nutrition programs; summer and after school programs).

Currently, New Leif is near the bottom of the ladder in funding education and children's services. The New Leif state PTA is concerned that further cuts will continue to erode the already lean budget for education. The failure of the legislature to act on a longterm solution to identify a stable source of funding for education will continue the downward spiral, making it even more difficult to recover lost ground.

At its last convention, the New Leif state PTA voted to develop a statewide campaign to "Invest in New Leif's Children" and stop the cuts to this year's budget. The PTA is also calling for the legislature to develop a plan for a long-term solution to education funding. The PTA has assumed a leadership role in coordinating the campaign. They have succeeded in getting the New Leif Education Association (the teachers' union) and the State School Board Association to join the campaign and are working on getting more organizations to join. While all PTA units have been asked to pressure their legislators, the state PTA has done an analysis of the Legislature and targeted some key districts where more intense pressure will be necessary.

The NLPTA knows that to be successful it must demonstrate and unleash the power of their grassroots membership and organize others to participate in the campaign. They want to use this campaign to build the organization and develop a model advocacy infrastructure that can be used for other issues. In so doing, they also want to increase the power and membership of the PTA so that they are a force to be reckoned with the state.

This week, your PTA County Council told you that your State Senator, Olivia Rosten, is a key target. Your unit is in the Freemont School District, which lies in Assembly District 13. The Freemont School District has 10 K-6 elementary schools and three junior high schools. You have been asked to take the lead in coordinating the campaign in Assembly District 13.

## STATE SENATOR OLIVIA ROSTEN

Your immediate task is to plan a campaign to get Republican Senator Olivia Rosten to oppose the state budget cuts. Sen. Rosten is a career politician. She was elected to the Assembly in 1990 and was reelected thereafter until she resigned to run for the State Senate in 1998. She has been reelected every term since then. Her committee assignments include: budget, human services and aging, health & education, utilities, and military and veterans affairs. She has a B.A. in anthropology from the state university, has six grandchildren, and once worked as the director of community services for a local hospital.

## RESULTS OF OLIVIA ROSTEN'S LAST ELECTION:

Republican Incumbent Rosten .....	28,434
Democratic Candidate .....	24,044
Libertarian Candidate .....	816

Senators serve staggered four-year terms. Half of the Senate is up for election every two years. Assembly members serve two-year terms and the whole assembly is up for election each time. Sen. Rosten had no primary opposition in the last election. She is up for reelection this year.

## THE FIFTH DISTRICT

Sen. Rosten's Fifth District takes in a portion of the state's largest city. The district then goes straight south to include parts of two wealthy suburban counties. The Senate district includes all parts of three assembly districts —the 13th, 14th, and 15th. Freemont School District lies in Assembly District 13.

District #	Population	White	Black	Asian	American Indian	Hawaiian Pacific	Latino	Other
SD- 5	143,690	102,229	32,555	3,051	1,010	78	4,088	291
AD-13	49,241	25,668	19,863	1,349	332	27	1,568	147
AD-14	47,275	38,939	6,105	1,104	191	34	813	68
AD-15	47,174	37,622	6,587	598	487	17	1,707	76

Voting Figures for the State Assembly races in Senate District 5:

- # 13 Incumbent Dem = 20,080. Unopposed.
- # 14 Incumbent Rep = 20,268. Unopposed.
- # 15 Incumbent Dem = 15,489. Libertarian = 2,174. (No Republican ran.)

In an initial discussion with your county Council staff, Sen. Rosten said that she was inclined to support the cuts as the state "... just has no more money"! Sen. Rosten went on to say that she respects the PTA and cares deeply about all children, but has a responsibility to see that the state has a balanced budget. She also said that she has been hearing from many people in her district that taxes are way out of control and they want tax cuts.

## ASSIGNMENT

### TIME

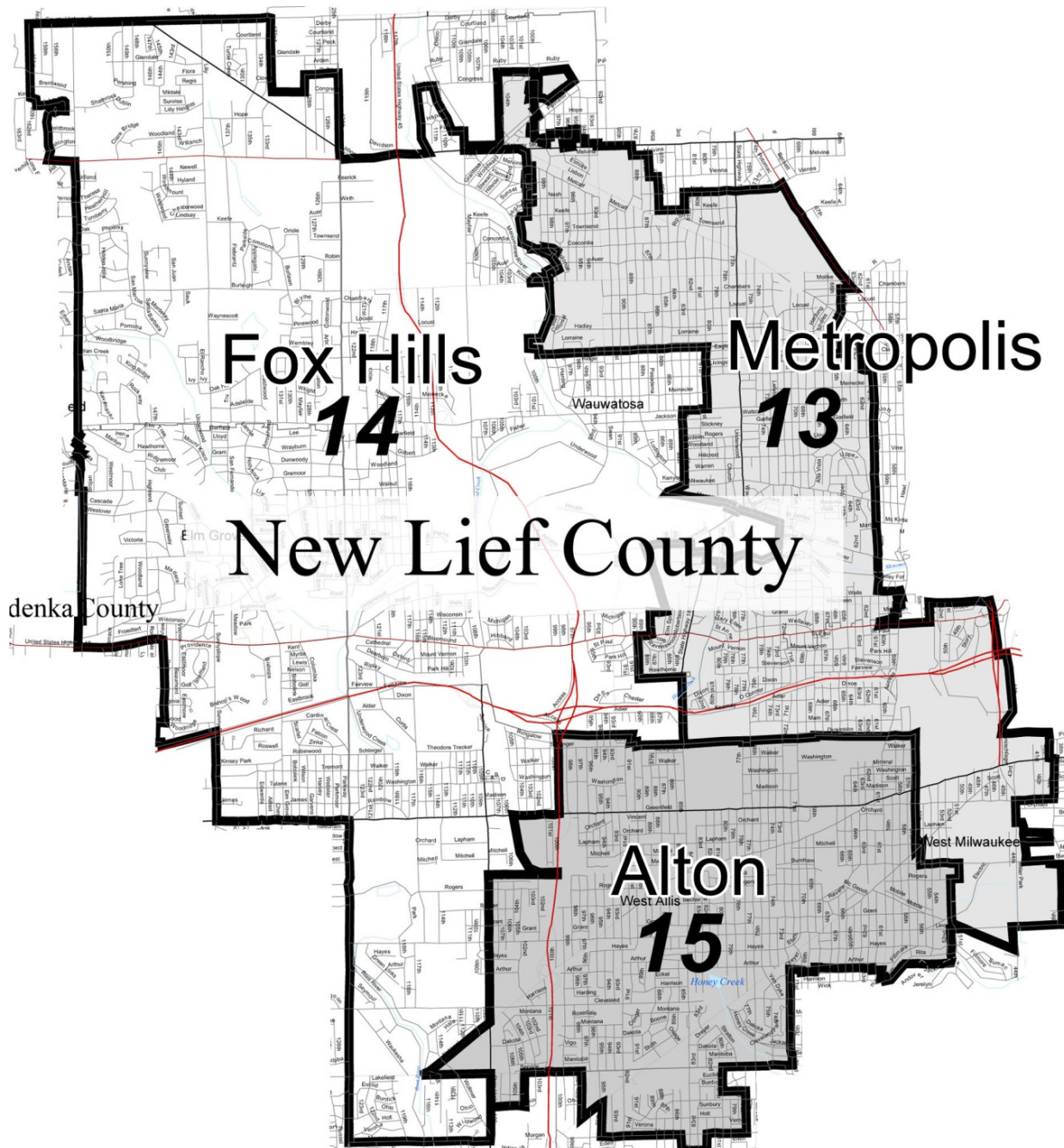
**Total: 20 minutes**

Make a strategy chart for a campaign to get Sen. Rosten to agree to vote against the budget cuts. Choose one person to present the chart to the whole group. You can make up any information you need as long as it is realistic and probable. For your Organizational Considerations column, make an educated guess about the actual budget, staffing, desired outcomes and internal problems of the campaign based on the situation in your own state/district. Consider resources that are available to you from all levels of the PTA.

Choose someone to lead your group through the chart. Write the chart on easel paper with one column on each sheet. The chart should be presented by the person who wrote it. (It is easier for the presenter to read his/her own handwriting.)

## New Lief —Senate District 5

Assembly Districts: Metropolis — 13, Fox Hills — 14, Alton — 15



## Coalition Exercise

State

### FREMONT PTAS ORGANIZE A COALITION

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a statewide issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to stop the \$2 billion in cuts to the state budget, the New Leif PTA has asked PTA units that have not received a commitment from their state senator to vote against the cuts to invite other organizations into the campaign to increase their power. A few members from PTAs in Fremont met with Sen. Rosten and asked her to vote against the cuts. Sen. Rosten says that she is getting a lot of pressure from some of her constituents to vote for the cuts. Several of the Fremont PTAs have decided that to win they must form a coalition. In addition to recruiting all the PTAs in the area, you are considering asking the following groups to join the coalition:

- The Fremont Retail Merchant Association
- The Fremont chapter of the State Senior Citizen Federation
- The Fremont Interfaith Committee
- The Fremont branch of the NAACP



## Coalition Exercise

**State**

### ASSIGNMENT



#### TIME

**Total: 20 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the Fremont PTAs.



## Media Exercise

## State

### MEDIA AND CAMPAIGN TO INVEST IN NEW LEIF'S CHILDREN

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA in the Fremont School District, working to save school funding which the state legislature is proposing to cut. Your PTA unit and others brought a large group of parents to the state capitol to talk with State Senator Olivia Rosten, as a part of a much larger rally organized by the New Leif State PTA and its allies. Your PTA unit president was one of the speakers at the rally on the capitol steps, and then a delegation from your unit went to Sen. Rosten's office and met with her. She listened, but refused to commit to vote against the funding cuts. She is still undecided, she says. She wants to cast a vote that will be fiscally responsible and balance the state budget. The actual vote is still a month away.

## Media Exercise

## State

### ASSIGNMENT

#### Exercise 1

As you leave the state capitol building, a reporter thrusts a microphone at you and asks for a comment.

What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after the rally and meeting with Sen. Rosten, you and three or four other parents are on a public affairs talk show on the local public radio station.

The State Senate Finance Committee Chairman was on just before you, and he said that there simply is not enough money. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.

## Meetings Exercise

State

### THE FREMONT PTA MEETS WITH SENATOR OLIVIA ROSTEN

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

The Fremont PTA and its coalition partners have been conducting a campaign to stop the funding cuts to public schools in the state. At a recent meeting with a few PTA members, State Senator Rosten refused to take a position on the funding cuts. She claims she is torn about what to do. She wants to uphold her reputation for being fiscally responsible.

State Senator Rosten is truly undecided. She has agreed to meet with a delegation from the campaign to discuss the issue. Rosten is very concerned about her next race, which is in November. You have been informed that the vote will take place in one month.

#### ASSIGNMENT

You have 20 minutes to plan your meeting with Sen. Rosten who has agreed to meet in her district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Sen. Rosten?

Use the Checklist For Planning a Meeting With an Official pages of this handout to help your preparation.

After planning, you will have a mock meeting with Sen. Rosten in which you must convince her that she has more to gain by supporting the PTA and its allies and opposing the funding cuts.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.

## Strategy Exercise

## Federal

### THE CAMPAIGN TO IMPROVE FOODS SOLD OUTSIDE SCHOOL MEAL PROGRAMS

#### OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the U.S. Congress.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Nutrition standards for foods sold outside school meal programs but in schools (competitive foods) have not been updated since 1979. Such foods include those sold in vending machines, cafeteria a la carte menus, and school stores. The only nutritional criteria for school foods sold outside of meals are that “foods of minimal nutritional value” (FMNV) may not be sold in the food service area during meal times.

This year, the U.S. House Committee on Education and Labor has introduced the Child Nutrition Reauthorization Act (H.R. 789). This bill, reauthorized every five years, has jurisdiction over school meal programs. In the past, Congress has considered nutrition standards for competitive foods, but has not put them into law. Members from both parties have supported and opposed these standards.

National PTA, representing the wishes of its members, has asked Congress to amend the Child Nutrition Reauthorization Act to include a minimum federal protective nutrition standard for foods sold outside of school meals. National PTA public policy staff has done an analysis to determine which members of Congress need to be targeted to pass the amendment and the final bill.

#### REP. ETHAN CHARLES

(D, New Leif- CD 2)

In 1997 Rep. Ethan Charles (a purely fictional Congressman from the equally fictional state of New Leif) was appointed Assistant State's Attorney in the county and served until 2001. Active in the Young Democrats, he was elected to the American Council of Young Political Leaders' delegation to Taiwan. In 2003, at the age of 34, he was the elected State's Attorney (youngest) for the county. He was on the Governor's transition team.

Elected to his first term in Congress in 2008, Charles has tended to vote more with the “moderates” believing that his margin of victory came from conservatives and independents. He voted against the House health care bill on the grounds that it is too big and too costly — a view that some of his constituents share.

Rep. Charles is a member of the House Committee on Education & Labor. Two members of the State PTA recently met with Rep. Charles. He told them that while he was concerned about the health of children, he thought that the PTA was going a bit overboard. “Kids will be kids” he said, “... and they will buy junk food anyway – that’s what kids do. At least when they buy it from school vending machines, a percentage of the sales goes to support school sports programs.” National PTA public policy staff has determined that Rep. Charles’ vote for the amendment in committee is essential to its passage. He could be the deciding vote! In addition, they think getting his support will also help in getting other members on board.

In a conference call with state presidents, National PTA public policy staff have laid out the strategy to pass the Child Nutrition Reauthorization Act. Your state president in turn has called your County Council to ask that you develop a campaign to get Rep. Charles to vote for the amendment, as well as the final bill. The vote is expected to take place in three months. During his campaign, Charles supported the concept of “Healthy Schools”. He now says that he is getting a lot of pressure from conservatives and libertarians in his district to oppose any federal legislation that preempts state and local control of nutrition standards.

Rep. Charles’ district is just outside a major metropolitan area. It touches the city and takes in suburbs and tourist regions. It then extends into rural areas (with some small farms) until it reaches the city of Wellsboro, the regional center of food production and processing (including snack foods) and the Super Cola bottling plant.

The PTA County Council has assigned one staff person to work half-time on this issue. In addition, there are two interns from a local community college in the district, who are available three afternoons a week. Besides salaries and travel expenses, the Council has only \$1000 for work in the Charles district. Any more will have to be raised.

The district is considered 64% urban. In this district, 13% of the population is over the age of 65 which is about the national average. By actual count that comes to 89,000 people. An additional 59,000 people are between the ages of 55 and 65. The largest minority group in this district is African-American (9%). Other groups total only 2%. The median family income in the district is \$52,000 a year, which is about ten thousand over the national average.

In the four elections prior to 2008, this district went Republican, and was considered a safe seat for Millard Gilpeak although there was always the possibility of a primary challenge from the right wing of the party. This occurred in the 2008 primary and Gilpeak was ousted by a conservative Republican. Once off the Republican ticket, Gilpeak endorsed the Democrat, Charles, who won by a very narrow margin. Gilpeak's voting record on social issues showed him split between liberal and conservative positions. In fact, his National Journal rating was 56% liberal and 44% conservative on social issues and about the reverse on economic issues. He was endorsed by the Sierra Club and League of Conservation Voters. He supported gun control, equalization of school funding, and DC statehood. He recently voted for the minimum wage increase but against card check recognition to help union organizing.

## REP. CHARLES' POSITIONS

- On federal budget issues, he is a deficit hawk. He supports adding a balanced budget amendment to the Constitution and strict spending caps for Congress.
- Unlike his Republican predecessor, he opposes gun control.
- He is for strict enforcement of immigration laws.
- During this first term, he voted for the stimulus package, and the Clean Energy Bill.

## DISTRICT VOTING DATA

The actual voting data shows some potentially useful patterns.

Total Vote in 2000	Gilpeak (R)	Rosterman (D)
	165,293 64%	91,022 35%
	<b>Bush</b>	<b>Gore</b>
	160,402 57%	111,807 40%
Total Vote in 2002	Gilpeak (R)	Fishbine (D)
	245,149 76%	77,872 24%
Total Vote in 2004	Gilpeak (R)	Schwartz (D)
	245,149 76%	77,872 24%
	<b>Bush</b>	<b>Kerry</b>
	213,144 62%	124,163 36%
Total Vote in 2006	Gilpeak (R)	Gronoffski (D)
	185,353 69%	83,817 31%
Total Vote in 2008	Marris (R)	Charles (D)
	173,478 48.4%	176,052 49.1%
	<b>Bixbe (Libertarian)</b>	
	9,190 2.5%	
	<b>McCain (R)</b>	<b>Obama (D)</b>
	216,896 59%	148,029 40%

### Voter Registration and Turnout in Charles's District

	Registered 2008	Voted in 2008	Percent Voted 2008
<b>Republicans</b>	193,584	161,330	83%
<b>Democrats</b>	200,216	160,753	80%
<b>Unaffiliated</b>	71,443	50,310	74%
<b>Libertarian</b>	1,141	784	69%

There are parts of 12 counties in this district. Of those, Obama carried only two, the second largest county and the smallest. Charles carried in seven counties of the ten that also went for McCain.

## POSSIBLE OPPOSING ORGANIZATIONS

Voter Registration and Turnout in Charles's District

Name	Notes
National School Board Association (NSBA)	NSBA supports state and local control of nutrition standards, but does not support federal regulations.
Snack Food Association	The Snack Food Association supports the snack food industry and represents snack manufacturers and suppliers. They are wary of federal restrictive nutrition standards and have concerns that their products won't meet these standards. If federal standards were passed, they prefer these standards to preempt state standards so that their products don't have to meet both state and federal standards.

## ASSIGNMENT



### TIME

**20 Minutes**

From the point of view of the *Campaign to Improve Foods Sold Outside School Meal Programs*, prepare a strategy chart showing how you would set up a campaign to get Congressman Charles to vote "Yes" on the amendment to the Child Nutrition Reauthorization Act. Put the chart on easel paper one column to a sheet. Add a four-month time line. Choose someone to present it to the whole group. If you need additional information you may pretend you did the research and make it up. Just keep it within the realm of the possible and plausible.



## Coalition Exercise

## Federal

### REAUTHORIZATION OF THE CHILDHOOD NUTRITION ACT

#### OVERVIEW

Participants practice evaluating possible coalition partners to work together on a federal issue.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

In the campaign to pass the Reauthorization of the Childhood Nutrition Act, the National PTA has asked your county council to get Congressman Ethan Charles to vote “YES” on an amendment to include a minimum federal protective nutrition standard for foods sold outside of school meals. PTA leaders met with Rep. Charles and asked him to vote for the amendment and the reauthorization. Rep. Charles was quite friendly. He said that he totally respected the PTA and all its good work, but he thinks that trying to “regulate what is in a school vending machine is just not the role of the federal government.” Your PTA has decided that to win it must form a coalition. You are considering asking the following groups to join:

- The County Medical Association
- The Interfaith Committee
- Local 123 of the State Education Association
- The County Branch of the NAACP

## Coalition Exercise

**Federal**

### ASSIGNMENT



#### TIME

**Total: 30 minutes**

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

*NOTE:* Do not role play the planning meeting. Answer the questions from the perspective of the PTA County Council.

## Media Exercise

## Federal

### REAUTHORIZATION OF THE CHILDHOOD NUTRITION ACT

#### OVERVIEW

Participants practice focusing their message in the face of questions from the media.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

Everyone will use the same scenario below, but each person will be assigned to do *either* Exercise 1 or Exercise 2. Everyone will have 15 minutes to prepare, and then we will begin the interviews.

You are a leader of the PTA county council in the district of Congressman Ethan Charles, working to get federal nutrition standards for competitive foods. Your PTA unit met with Rep. Ethan Charles at his district office to ask him to vote yes for nutrition standards. He says that he needs more time to study the issue; he is reluctant to have the federal government tell children and their parents and their local schools what to do. The actual vote is still a month away.

## Media Exercise

## Federal

### ASSIGNMENT

#### Exercise 1

As you leave the district office building, a reporter thrusts a microphone at you and asks for a comment. What will you say? What is the main point you want to make? How will you respond to questions? Remember that your time with the reporter is likely to be very brief! If you appear on the evening news program, it is not likely to be more than a 15-second clip.

#### Exercise 2

The morning after your meeting with Rep. Charles, you and three or four other parents are on a public affairs talk show on the local public radio station.

The president of the Snack Food Association was on just before you, and he said that they are being blamed, when they are doing everything they can to produce healthy snacks. Besides, it is up to parents to teach their children what to eat. The money from the soda machines pays for lots of extras at local schools, like uniforms for sports teams. What will you say? What are your main points? How will you handle questions? Your segment on the show will last 10 minutes.

## Meetings Exercise

### Federal

### THE PTA COUNTY COUNCIL MEETS WITH CONGRESSMAN ETHAN CHARLES

#### OVERVIEW

Participants practice winning the support of an elected official.



#### TIME

**Total: 30 minutes**

- Exercise: 20 minutes
- Debrief: 10 minutes

#### BACKGROUND

The county council and its coalition partners have been conducting a campaign to amend and pass the Reauthorization of the Childhood Nutrition Act. At a recent meeting with PTA members, Representative Charles said even if he voted for the Reauthorization Act he is concerned that the amendment to regulate competitive foods would be an example of government getting involved in something in which it should not be involved. He repeated the comment he made recently on a radio show that parents should be teaching their children how to make nutritious choices.

While Rep. Charles has been indicating that he will not vote for the amendment, you have heard that he is really worried about his upcoming election. He has said that he has to pay attention to libertarians in the district as he thinks they were the margin of victory in his election. He has agreed to meet with a delegation from the PTA and others in the coalition to discuss the issue. Charles is very concerned about his next race, which is in November. You have been informed that the vote on the amendment will take place in one month.

#### ASSIGNMENT

You have 20 minutes to plan your meeting with Rep. Charles who has agreed to meet in his district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Rep. Charles?

Use the Checklist For Planning a Meeting With an Official to help your preparation.

After planning, you will have a mock meeting with Rep. Charles in which you must convince him that he has more to gain by supporting the PTA and its allies and voting for the amendment.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.