



BASICS

Advocacy

Resource Guide
2018-2019

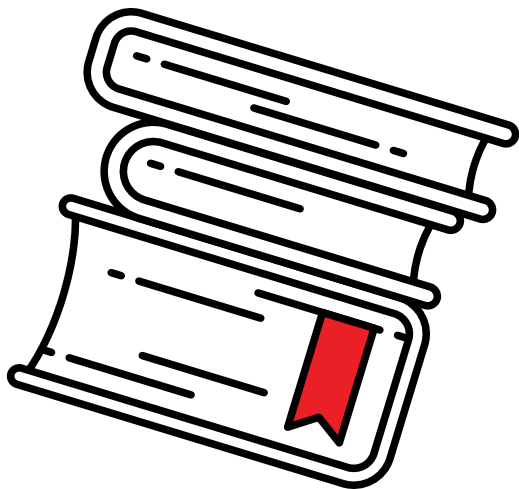
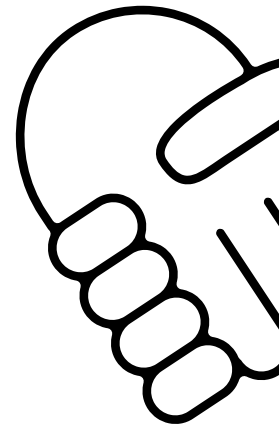
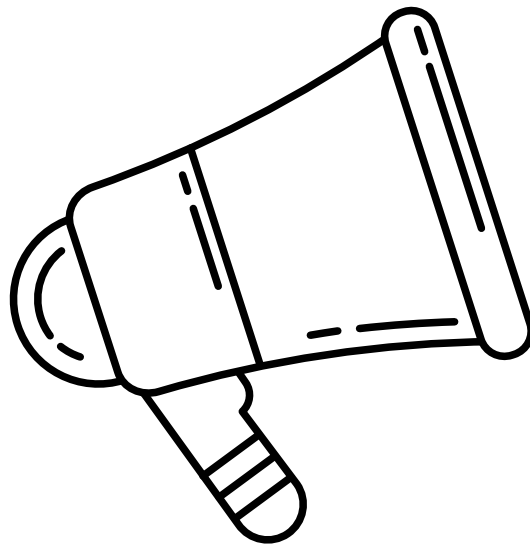
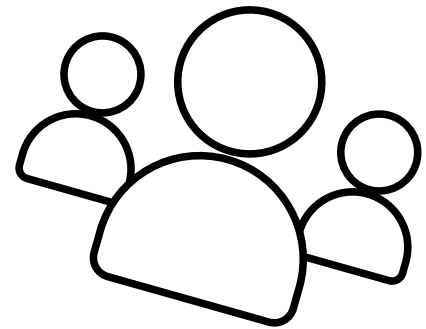
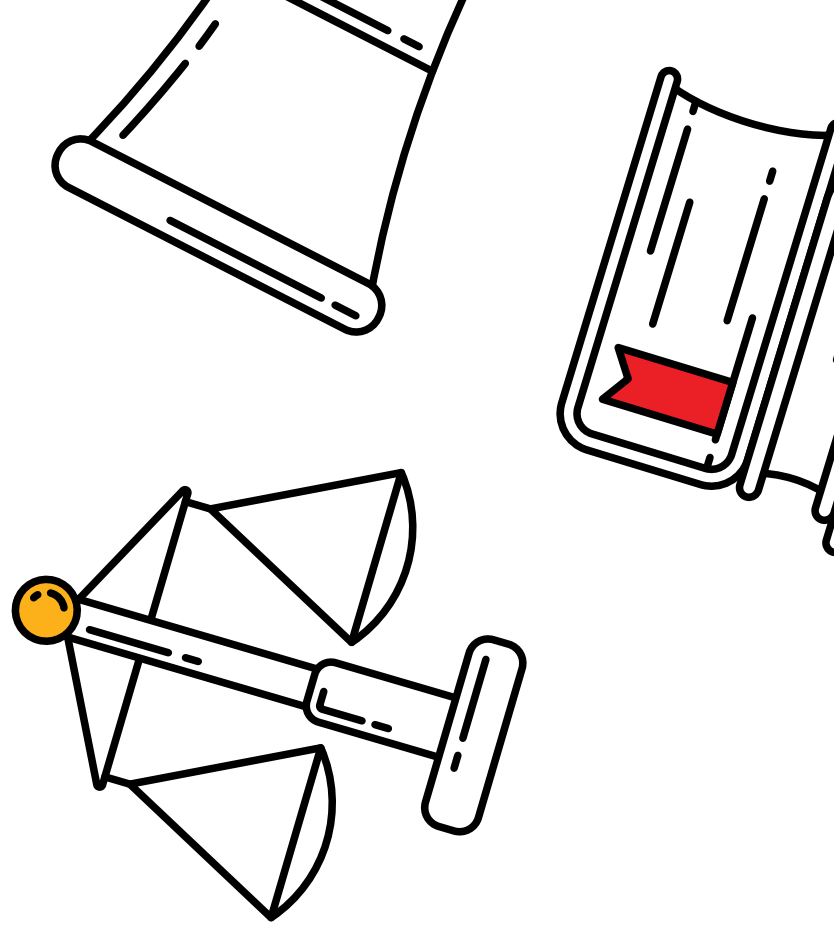


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Introduction

This guide is meant to empower PTA's greatest strength — its members — with effective strategies and resources for advocacy. Whether you are the Advocacy Chair on your executive board, or have committed to advocate on behalf of our children in your community as a PTA member, this guide will provide you with helpful information on effective advocating in PTA. Your work makes a difference in the lives of children in your communities and throughout Texas.

PTA has many resources to assist you with advocacy, leadership and communication skills. For PTA leaders new to legislative advocacy, we hope this guide will help you take the first steps to building and leading an effective advocacy program. Use this information to work on what you believe you can reasonably accomplish within your PTA. For more experienced advocacy leaders, you may use this guide to build on an existing advocacy program.

About PTA

VISION Every child's potential is a reality.

MISSION To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- **Standard 1: Welcoming All Families into the School Community**
Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- **Standard 2: Communicating Effectively**
Families and school staff engage in regular, two-way, meaningful communication about student learning.
- **Standard 3: Supporting Student Success**
Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- **Standard 4: Speaking Up for Every Child**
Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- **Standard 5: Sharing Power**
Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- **Standard 6: Collaborating with Community**
Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



Advocacy History of PTA

PTA is the largest child advocacy association in the nation. Advocacy has been an important part of PTA for over 100 years. From the beginning, PTA leaders have been focused on giving our children the highest advantages in physical, mental, social and spiritual education.

Some of our earliest issues included:

- The abolition of the public drinking cup
- Creation of vaccination requirements
- Creation of birth certificate
- Creation of kindergarten
- Creation of school lunch programs
- The proper construction of school buildings
- The married women's property rights bill
- Allowing jury service for women

Some of our more recent legislative issues are:

- Funding of school-based health clinics
- Limiting access of children to tobacco and alcohol products
- Including school supplies to the annual tax-free holiday
- Requirement of site-based decision making committees on all campuses
- The restriction of children riding as cargo in the back of pickup trucks
- Statewide safety standards for playgrounds
- Graduated Driver's Licenses for teenagers
- Reduction in the number of End-of-Course Exams required to graduate

For a detailed list of our current legislative priorities, positions, and resolutions, visit txpta.org/advocacy

How Do I Advocate?

Advocacy simply means “the act of speaking on the behalf of or in support of another person, place, or thing. As parents, we advocate for our children all the time. What you do to improve laws, policies and conditions on behalf of children is advocacy; whether in your community or at the district, state and federal levels. PTA defines advocacy as the act of mobilizing individuals and Local PTAs to work with the State and National PTA to spark changes in programs and policies that benefit children.

There are many forms to use when advocating: letter writing, emails and phone campaigns. We all lead busy lives, so it’s important to know that advocating doesn’t have to take much time. Here are several ways to advocate in 30 minutes or less:

Estimated Time	What You Can Do
1 minute	Leave a phone message.
5 minutes	Make a phone call.
5 minutes	Write a postcard.
10 minutes	Send an email to all the people you know who have email.
30 minutes	Write a letter to the editor of the PTA newsletter.
30 minutes	Write and email a letter to the editor of the local paper.
30 minutes	Write and email a press release to the local newspaper.
30 minutes	Meet with your legislator (plus travel time).

More advanced ways to advocate might include conducting a forum or hosting a rally.

CONTACTING YOUR ELECTED OFFICIALS

Whether you are writing a letter/email or calling your legislator, here are a few tips that the National Education Association recommends:

- **Keep it brief:** Discuss one bill or issue in a letter/email.
- **Identify Yourself:** Include your name and organization you represent.
- **Get to the Point:** Follow your introduction with a brief statement of your issue or concern.
- **Relate it to Home:** Help the legislator understand why your position is important to his or her constituents. Include specific facts about how a bill will impact educators, students or schools in the legislator’s district.
- **Allow for Follow Up:** Include specific contact information and offer to act as a resource should the legislator or staff have questions or need additional information. State in the letter that you will follow up with a telephone call.
- **Address the Letter/Email Correctly:** Use correct title of Senator, Representative and include “ U.S. / Texas House of Representative” or “U.S./Texas Senate”.

In an email, you will want to make sure that you:

- Avoid informal language
- Include your full address and zip code

When Texas PTA puts out a call to action, we often provides sample letters/email that you can customize with your information and quickly send.

If you are going to call your representative, you will also want to consider:

- You will most likely talk to a staffer instead of your representative. They are just as important as your representative. Ask to speak with the aide who handles the issue to which you wish to comment.
- Don’t forget to thank them for their time and consideration.

Getting Started

ADVOCACY CHAIR RESPONSIBILITIES

What does an Advocacy Chair do? In order to keep members informed and participating in calls for action, here are some duties of the chair:

- Maintain a procedure book (traditional or electronic)
- Complete a Plan of Work and submit for approval by the Local PTA Executive Board
- Attend Local PTA Executive Board and membership meetings
- Take advantage of training from Council and Texas and National PTA
- Become familiar with National and Texas PTA resources
- Register as an Advocate at txpta.org/advocacy
- Promote and participate in Texas PTA's biannual Rally Day
- Advocate for PTA positions and current legislation
- Provide executive board and membership with legislative updates
- Share action alerts with membership and encourage participation
- Recognize members and volunteers who participated in advocacy activities.

Additional activities might include:

- Determine local issues and needs through PTA websites, local and national media, school district policies, school board meeting topics, and member surveys
- Develop and implement an advocacy project
- Plan and participate in a candidate forum
- Share your success with Texas PTA via Talk of Texas

ADVOCACY CHAIR TIMELINE

FIRST STEPS:

- Develop your plan for the year and complete your Plan of Work
- Identify funding options for your activities, especially for Rally Day attendance
- Develop a timeline
- Training is your best guide. Look for training opportunities at LAUNCH, with your Council PTA or Field Service Representative
- Register as an Advocate at txpta.org/advocacy
- Familiarize yourself with Texas PTA legislative positions/resolutions and priorities
- Identify your state representative and state senator before the start of the next session. The Legislative Session begins January in odd-numbered years.
- Create a binder with issue information, representation information and voter registration cards
- Share updates and alerts with members; ask for time to briefly report at all executive board and membership meetings.

IN EVEN-NUMBERED YEARS

January to December

- Create an email group of members who are interested in advocacy and forward all information to them
- Report regularly at PTA meetings and ask for space in the newsletter or whatever communication vehicle you have for a short note
- Talk to your members to identify important issues to your PTA
- Share information about new laws/advocacy successes and continuing goals with members to promote engagement
- Meet with legislators in their district offices
- In November, begin to reach out to legislators about meetings for Rally Day
- Look for webinars and other help for Rally Day preparation

IN ODD NUMBERED YEARS

January to June 15

- Support Texas PTA's legislative agenda
- Respond to alerts from Texas PTA and encourage your members to do so, as well
- Promote and attend Texas PTA Rally Day in Austin
- Confirm funding options for attendance at Rally Day
- Follow your timeline for Rally Day preparation
- Advertise all advocacy sessions at LAUNCH (ie., Planning for Rally Day)
- Challenge other Local PTAs to team with you to bring a large group to Rally Day
- Make and confirm appointments for Rally Day with legislators who represent your PTA

July to December

- Meet with your legislators in the community about the recent session
- Share information about new laws with members
- Attend LAUNCH

FOR EXPERIENCED ADVOCACY CHAIRS

- Follow the actions of your school board, especially budget drafting in the summer
- Consider volunteering for your Campus Leadership Team or School Health Advisory Council
- Get to know your superintendent and other administration officials
- Host a candidate or issue forum
- Develop a candidate questionnaire and publicize the candidates' responses. Your executive board needs to approve questions to be used at the forum
- Have voter registration forms available at all PTA/PTSA meetings
- Educate candidates about PTA issues
- Remember to keep it nonpartisan, non-secular and open-minded



Plan of Work Plan de Trabajo

Officer/Chairman Name:
(Nombre de Oficial/Presidente de Junta) _____

Position: Advocacy Chair **Year:** 2017-2018
(Posición) _____ (Año) _____

Reproduce as needed for the appropriate number of goals.
(Se puede reproducir para metas adicionales.)

Responsibilities / Duties: (Responsabilidades)	To communicate information to the executive board and members on important legislative activities affecting education, and to foster participation in the political/legislative process.	Committee Members: (Miembros del Comité)	Interested parents, students and community members.
Goal: (Meta)	Increase participation by executive board members and PTA members who contact their elected officials to advocate for PTA positions.	Evaluation Process: (Proceso de Evaluación)	Response to calls to action and attendance at forums, rallies and information sessions.

Specific Action Steps (Proceso Especifico de Acción)	Start Date (Fecha de Empezio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
Create email distribution list for legislative news, and send call for action items, when needed.	September	September	\$0
Write e-mail newsletters to inform members of legislative action related to PTA priorities and inform/encourage voting in elections.	September	Ongoing	\$0
Send out call for action when PTA members need to take a stand on an issue.	As Needed	Ongoing	\$0
Encourage and coordinate a group to attend Rally Day (in odd numbered years); include arrange transportation.	October	March	\$0 - \$500
Find volunteers for forums (can be held jointly with other organizations, i.e. League of Women Voters).	September	April	\$0 - \$100

Resources: (Recursos)	Council Rep, Texas PTA, former members active in leg., current district legislators, legislator aides, newspapers, League of Women Voters, legislative blogs and websites.
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Legislative Basics

COMPOSITION OF THE TEXAS LEGISLATURE

- Composed of 150 representatives elected every two years, and 31 senators, half of whom are elected every two years for a four-year term.
- The election takes place on the first Tuesday in November of even numbered years.
- The districts from which the representatives and senators are elected are determined every ten years, based upon the population census.
- The district boundaries are established so that approximately the same number of people is in each district, in line with the one-man, one-vote principle.

LEADERSHIP AND COMMITTEES

- The Lieutenant Governor is the presiding officer of the Senate, and may vote only to break a tie.
- The Speaker of the House, elected by the House, presides over the House of Representatives, and may vote on all questions.
- Other very powerful persons in the legislature are the chairmen of the House and Senate committees and subcommittees. After legislation is assigned to a committee, it is up to the committee leadership and members to determine whether the bill should be studied further, amended, rejected or passed.
- It is important to have a good working relationship with the House and Senate leadership and with the chairmen of the committees and subcommittees which routinely deal with legislation pertaining to the welfare and education of children.
- In the Texas Legislature, the committees which most often are called upon to study “children” legislation are:
 - Senate Education Committee
 - House of Representatives Public Education Committee

TEXAS LEGISLATIVE PROCESS

Regular Session

- Regular sessions of the Texas Legislature begin on the second Tuesday of odd-numbered years and are limited to 140 calendar days.

Special Session

- Only the Governor may call a Special Session, which is limited to 30 days.
- The only subjects that may be considered during the Special Session of the Legislature are those, which are proposed by the Governor.

Types of Legislation

- Bills are how a law is made. They have to be written and sponsored by someone, and they then have to pass both houses after full debate and public hearing before they can be sent to the governor for his signature.
- A resolution is an original main motion which, because of its importance, length, or complexity, is submitted in writing. Resolutions seek to address problems, situations or concerns which affect children and youth and which require action for solution.
- A legislative position is a statement outlining the opinion, will or intent of the association to address statewide problems, situations or concerns that affect children and youth. A position statement usually requires initial action to seek resolution on the issue, but the position is sometimes maintained, even when action has been taken, to substantiate the continuing will of the association

YOUR PTA REPRESENTATIVE(S)

Familiarize yourself with the districts and representatives for your PTA membership. You can find a map of districts and representatives at www.house.gov/representatives/find/. You may want to print out the information for each representative/district for your PTA membership, and store it in the back of this guide for easy reference. Information that you will want to capture are:

- TX Representative(s) - Name, phone, email address, website link
- TX Senator - Name, phone, email address
- US Representative(s) - Name, phone, email address
- US Senator - Name, phone, email address
- SBOE (State Board of Education) Representative - Name, phone, email address

Many of the representatives have e-newsletters. Subscribing to their newsletters is a great way to keep informed of their work and stance on issues important to PTA.

RALLY DAY

PTA members from across the state come to Austin during the legislative session (odd numbered years) to support the Texas PTA legislative priorities. At Rally Day you will:

- Learn about the Texas PTA legislative priorities
- Obtain materials to present to legislators
- Rally on the steps of the Capitol
- Meet and visit with legislators

The following are some tips to effectively prepare for Rally Day:

- Attend the Rally Day webinars (dates will be posted to the Texas PTA website):
 - Getting Started – Planning for Rally Day: What is it and how do I plan for it? Get details about this biannual event and how to plan for your PTA's participation with maximum success.
 - The Policy Issues, Tips for the Day, How to Find your Legislator: Become informed about Texas PTA's legislative priorities, tips on how to prepare for a legislative meeting and how easy it is to identify your legislators to set up an appointment.
 - Setting up and Conducting a Meeting with a Legislator: Legislators are accountable to voters and PTA members. Learn how easy it is to meet with a legislator and why what you say and how you say it can make a huge difference for Texas students.
- Set up meetings with your state legislators
- Sign up for Under the Dome for updates at our Texas PTA website
- Stay connected through our social media channels (Facebook, Twitter and Instagram)
- Promote, register and arrange for travel and other logistics for Rally Day
- Stay tuned for more information!

Effective Advocacy

In PTA, we have no connection with any political party or candidate for office. You must work with people from all political parties.

As a PTA, We May:

- Take positions on issues related to education and child advocacy, including initiatives and referenda voted on at the local or state level.
- Speak to legislators and public policy makers regarding issues.
- Arrange and support activities that serve to inform members about issues.
- Promote participation in civic activities by registering voters and encouraging turnout.
- Arrange, support, sponsor and advertise public information forums.
- Educate members on various issues and their impact.
- Share the voting records of elected officials.

As a PTA, We May Not:

- Participate or intervene in, directly or indirectly, any political campaign on behalf of any candidate for public office. This includes both partisan and non-partisan races such as for school board.
- Support, oppose or endorse, in any way, any candidate who is running for a public office, including school board.

Note: Any PTA member who chooses to support or oppose a candidate or party must express that support or opposition apart from any affiliation with PTA. Keep in mind if you are an officer in PTA, it is difficult for others to separate you from your position (particularly on Social Media).

Selecting an Issue

Often there are more child-related issues than a PTA can effectively address. So, how do we decide where we will focus our advocacy efforts? First, we focus on an issue, not a problem. For example, crowded classrooms are a problem; the larger issue could be inadequate facilities or lack of funding for staff. Then we determine the following:

- Does this issue fit within PTA's Mission and Purposes?
- How does this issue concern young people in the school and/or community?
- What is the desired outcome?
- Can the issue be made understandable to those within and outside of PTA?
- Is the issue winnable?

Researching the Issue

Once you have chosen your issue(s), it is extremely important that you thoroughly research the issue. You can...

- Find as many sources of information about the issue as possible;
- Research the arguments both for and against; know who supports and opposes the issue;
- Conduct surveys and opinion polls in the community.

Organizing for Action

Organize your PTA members; reach out to include other community groups. An action plan that unites people behind an issue will include the following:

- Goals that are both long and short term: Have a long-range vision, but plan some activities that can be accomplished within a few weeks or months;
- Knowledge of what is required in terms of money, time and commitment;
- A list of groups that have the most to gain and the most to lose;
- Targets - those people who can affect the outcome of the issue (school boards, legislators, voters, influential organizations); and
- Tactics that fit the goals and involve many people in a variety of activities.

Developing the Plan

An effective advocacy campaign is built on activities and events that keep the PTA issue on the radar screen and cause people to pay attention to your cause. The following actions are key to the campaign:

- Design a strong message
- Fit the message to your goals
- Make it understandable
- Reach out to your members
- Survey to find out how they feel
- Target newsletters and membership meetings to get out the message
- Reach out to the community
- Conduct opinion polls to get a feel for community support/opposition
- Establish coalitions for broader outreaches

Using the Media

Taking your message to the public means using all the opportunities available in the media in the most effective manner. Some possibilities follow:

- **Newspapers:** Consider press releases, news stories, press statements, letters to the editor, op-eds (opinion editorials). Get to know the editorial board as well as the reporters who cover the issues about which you are concerned.
- **Radio:** Radio programming offers a variety of formats; consider news programs, call-in shows, and public service programs. Suggest your concern as a topic for a radio talk show or public service program.
- **Television:** This medium demands a visual presentation of your message. Consider action events, location for an interview, etc. Don't overlook cable TV and public access channels.
- Cultivate relationships with media contacts and develop a trust level. Be concise, specific and factual when you discuss your ideas. Present details about the local impact of your concern. Serve as an information resource that can be relied on to have the most up-to-date, factual information concerning the issue at hand.

Communicating with Your Elected Officials

Elected officials are people just like us. Most of them care deeply about their community, want to represent their district well, and need to know how community members feel and what we think in order to do that.

The bulk of the work of an Advocacy Chair is communication. Your job is to funnel information from Under the Dome, The Voice, and various Facebook and website postings to your PTA members.

Interim Period Communication - The Legislature only meets for 5 months every odd-numbered year, so for 19 months state legislators are back in your communities. This period is called the Interim.

Do You Know Your State Legislators?

If you have a relationship with your legislators, whether a new and developing one or a strong one, if your legislators support Texas PTA initiatives, call or email them to say “thank you” for their support of the Texas PTA Legislative Agenda. A quick call or email to say “thank you” reinforces the relationship you are developing with your legislators and reminds them that you are invested in the process and aware of their actions to support PTA priorities.

If You Don't Yet Know Your State Legislators:

Find out who represents you and your PTA. You have a state senator and a state representative, and maybe more depending on how big your PTA is.

Utilize The Interim To Begin To Develop A Relationship With Your Legislators

- Co-host with Texas PTA a recognition event for your legislator if he/she receives Texas PTA Legislative Honor Roll recognition.
- Consider giving one or more of your legislators Honorary Membership in your PTA.
- Invite legislators to speak at PTA meetings once school is in session. Have them share their agenda and be sure to talk to them about Texas PTA's agenda and your local issues.
- Invite legislators to attend special events at your school, community events at which the legislator(s) can begin to get to know your community and Texas PTA better.
- If your legislator has been a friend to public schools write a Letter to the Editor for your local paper. Be sure to let the legislator know that you have done so.

Scheduling A Legislative Office Visit

These directions work whether you are meeting with your legislators during the Interim Period, or whether you are meeting with your legislators once the legislative session has begun. The Interim Period is the BEST time to meet with your legislators in your community.

- Call Representative's or Senator's district office and ask for his/her scheduler. Purpose of visit: confirm you are a constituent, a member of Texas PTA and would like to discuss issues of interest to Texas schoolchildren.
- Get location, address and directions for the meeting

Mastering the Meeting

- Now that you've successfully scheduled a meeting with your legislator, it's time to prepare
- Prepare documents to share - information on your Local or Council PTA, and Texas PTA's legislative priorities brochure and/or Texas PTA's Advocacy Success document - all are available on Texas PTA website and will be sent to all who subscribe to Under the Dome and The Voice.
- Create an agenda for the meeting and make assignments if you are taking a group. Plan to review the agenda with the group prior to the meeting.
- The purpose of the meeting is to establish a relationship with your legislator

- If you can, determine if legislator has a connection to PTA. If so, note this in opening remarks, and legislator should be thanked for any support of previous issues of which you are aware.
- For group mtg, group leader should make introductions and begin the meeting by thanking legislator or aide for their past support, if applicable. Then leader should state the purpose of the meeting and make sure legislators know that there are constituents among the group. Next share information on local and state issues.
- Be prepared to meet with legislator or a staffer. If meeting with staffer, make your presentation as though you are talking with the legislator. Staffers, especially senior staff, have a great deal of responsibility and, generally, a great deal of knowledge on major issues. They are often able to influence the legislator's positions, priorities and, ultimately, votes.

It's "GO" Time

Meeting day has arrived! Remember, your goal is to set the tone for a strong relationship with your representatives and senator.

- Arrive promptly or a few minutes early, but be prepared to wait. You will probably have 20 minutes, so follow the meeting agenda to the best of your ability. It will help you stay on track.
- Tell legislator about your PTA and your school and about the initiatives that Texas PTA has pursued. Thank him/her for his service to Texas.
- Stick to the agenda, and remember that you are representing the views of the entire organization. No personal business should be discussed during these meetings.
- Be a good listener and observer. It is acceptable to refer to notes. Allow the legislator or aide to ask questions, offer their viewpoint and voting record.
- If legislator is "on board" with our issues, ask for his/her suggestions as to actions the organization may take to advance priorities.
- If you cannot answer a question, commit to finding the answer and contact the state office of Texas PTA for assistance.
- Avoid argument. Just state the Texas PTA positions. You may have to agree to disagree. Always be cordial and courteous - no exceptions. We are there to provide a viewpoint from their constituency and to begin to establish a relationship with the legislator.
- The group leader should wrap up the meeting with sincere thanks for the legislator's time and an offer to be of assistance. Be sure to include contact information.
- Confirm names of staff members with whom you meet.

Following Up - It's Key

This last step is such an important one. Be sure to follow up with your legislator and his/her staff. To begin to effectively advocate it is key to have several points of contact before the next legislative session begins. This thank you note is an essential point of contact.

- Follow up with a personal thank-you note when you return home. Include a note of thanks to staffer if you met with one.
- Post photos from your visit(s) on your Local PTA website and PTA Facebook page. Friend your legislator on Facebook if you have a PTA Facebook page.
- Send a photo to Texas PTA so we can post it too. It will encourage others to set up a meeting!

Submit and Promote Positions and Resolutions

You may submit a position or resolution for a specific issue for consideration by Texas PTA and/or National PTA. Submission procedures and requirements can be found on the respective websites. National PTA has an e-learning course that will instruct you on how to develop a resolution.

Each resolution or legislative position submitted to the Texas PTA is subject to consideration by the Advocacy Committee of the Texas PTA Board of Directors and must meet the following criteria:

- Support the mission of Texas PTA;
- Be in harmony with national and state PTA policies – noncommercial, nonpartisan, nonsectarian;
- Concern a matter of national or state scope, not merely local interest;
- Request action that is both physically and financially feasible for Texas PTA to undertake; and
- State a position not previously adopted by Texas PTA.

Resolutions usually consist of two parts:

- 1. Whereas Clause(s) – preamble or introductory statement(s) that contain the background information and reasons for the resolution. Each statement of information or rationale is listed separately and begins with the word “whereas.”
- 2. Resolved Clause(s) – the request for action. Each action has its own “resolved” clause.

Legislative positions usually consist of a single statement listing the new law or the change to existing law that is requested.

For more information on forming and submitting position statements and resolution, please visit txpta.org/advocacy and/or National PTA’s Advocacy webpage.

Advocacy-Specific Resources

- Follow Bills in Congress (<https://www.govtrack.us/>)
- Follow Bills in Texas Legislature (<http://www.capitol.state.tx.us/resources/FollowABill.aspx>)
- Find your Representative and Senator (<http://www.fyi.legis.state.tx.us/Home.aspx>)
- League of Women Voters (voter information) (<http://www.lwvtexas.org/>)
- Texas Primary Voters Guide (<http://freevotersguide.com/>)
- Voter Registration Site (<http://www.votetexas.gov/register-to-vote/>)
- Texas Education Agency (<http://tea.texas.gov/>)
- U.S. Department of Education (<http://www.ed.gov/>)
- State Board of Education (http://tea.texas.gov/About_TEA/Leadership/State_Board_of_Education/SBOE_-_State_Board_of_Education/)

Sources for Advocacy News on Education:

- Education News (<http://www.educationnews.org/category/education-policy-and-politics/>)
- Education Week (<http://www.edweek.org/ew/index.html>)
- Texas Education Association (http://tea.texas.gov/About_TEA/News_and_Multimedia/Press_Releases/TEA_News_Releases/)

Texas PTA Events and Training Opportunities (www.txpta.org):

- Texas PTA advocacy page
- Under The Dome e-newsletter
- The Voice
- Texas PTA Social Media (Facebook, Twitter, Instagram)
- Rally Day
- LAUNCH

National PTA Events and Training Opportunities (www.pta.org):

- National PTA advocacy webpage (Advocacy Toolkit)
- Advocacy e-Learning course
- National PTA Legislative Conference

What is a Procedure Book?

A procedure book is an annual record of the plans and activities of a given PTA position; a method to help you stay organized and focused; and is vital to the effectiveness of an on-going officer or chair.

How to Compile a Procedure Book

- Ask yourself, “If I knew nothing about the job, could I do it with this procedure book?”
- Depending on your position, you may need hard copy materials at your fingertips (President, Secretary, Treasurer, Parliamentarian, Membership). If so, using a loose-leaf folder or binder with tabbed dividers is recommended.
- If your position does not require hard copy materials available at meetings, you can organize your procedure book with digital files and folders and store it on a USB drive.
- Note: Be sure to turn over the procedure book and all digital records to the new chair/officer at the completion of your term (see bylaws, executive board member duties).

SUGGESTED TABLE OF CONTENTS

BYLAWS/STANDING RULES

- A current date stamped copy of the PTA bylaws and Standing Rules (request a copy of these items on the Texas PTA website annually after August 1)

ROSTERS:

- Dated Roster: contact information for your Local PTA Executive Board including committee members and relevant staff
- Contact information of Council and Texas PTA officers or chairs with comparable responsibilities
- Resource people, related agencies and organizations in the community

ITEMS RELATED TO YOUR POSITION (as applicable)

- Description and responsibilities of your job (found in the bylaws, standing rules, previous year’s procedure book)
- Current Texas PTA BASICS Resource Guide(s) relevant to your position
- Copy of your approved Plan of Work
- All reports given by you or your committee at meetings
- Financial records related to your position including expense reports with copies of your receipts, a copy of Itemized Receipt Forms (counting sheets) that you signed.
- Copy of promotional material, newsletter articles, planning sheets, evaluations, etc
- Award forms submitted by you or your committee to Council, Texas or National PTA
- Annual report- summary of your accomplishments during the year including recommendations for the following term

PTA MEETINGS

- Agendas and approved minutes from each meeting
- Financial Information
 - Approved/Amended Budget
 - Treasurer’s Report
 - Blank voucher forms for reimbursement of expenses
 - Tax exempt forms
- Handouts and updates received from Texas PTA, Council and Local PTAs
- Record of volunteer hours at home and school to be reported to the volunteer coordinator (if applicable)

Resources

Texas PTA is committed to providing our volunteer leaders across the state with the knowledge and skills they need to be successful in their role within PTA. Access to quality educational resources is a key component in supporting this success, as well as continuing to build strong Local and Council PTAs.

TRAINING

FOUNDATIONS courses provide a broad overview of “what” PTA is, and share important information that every PTA leader should know. All incoming executive board members are required, per the bylaws, to complete the *FOUNDATIONS: Leader Orientation* course prior to October 15th following their election or appointment.

FOUNDATIONS: Leader Orientation has two components that must be completed. There is \$10 course fee payable with the first component and this fee is reimbursable by your PTA.

Welcome to PTA is a high-level orientation to PTA that can only be taken online via the Texas PTA website at txpta.org/training.

Serving on a Local PTA Executive Board is the nuts and bolts of leading your PTA. This portion of the course is taken in person and provided by Council PTAs and Field Service Representatives.

BASICS contain detailed information to support volunteer leaders in their specific executive board position. Every executive board member is strongly encouraged to attend a BASICS course for their own position, as well as any other related positions.

BASICS include a workshop and companion Resource Guide, along with other supporting resources. The workshops may be available via webinar, at Texas PTA events such as LAUNCH, or locally through your Council PTA or Field Service Representative training opportunities. PTA Leaders can access the Resource Guides via the Texas PTA website or online store.

SPOTLIGHTS offer a short, in-depth review of some of the specific yet important topics and recurring PTA functions such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections.

Training may be available via webinar, at Texas PTA events such as LAUNCH, or locally through your Council PTA or Field Service Representative training opportunities.

NEWSLETTERS AND ALERTS

PTA Leaders can stay up-to-date by visiting the Texas PTA website to subscribe to content-specific e-newsletters or *The Voice*, Texas PTA’s e-magazine.

These timely and relevant communications allow PTA Leaders to stay current with important issues and programs, such as:

- Helpful hints to make PTA leadership effective and rewarding
- Sharing PTA successes in engaging members of their community
- Status of legislative priorities and public policy initiatives
- Programming updates on healthy lifestyles, arts in education, and Schools of Excellence
- Availability of Ready. Set. Achieve! parent education programs
- Recognition opportunities through honors, awards and scholarships

Appendix: How to Get the Conversation Started

HOW TO GET THE CONVERSATION STARTED WITH YOUR LEGISLATOR

The hard part is over; you have an appointment with your legislator. The meeting itself is the easy part. This is when you have the opportunity to communicate with a policy-maker about the issues that matter most to you and to Texas PTA.

Here is a sample script to help you prepare for your meeting:

Good morning Senator/Representative _____ . Thank you for taking the time to meet with me/us today.

My name is _____ and I am a constituent of yours. I live in _____ and my children attend _____ School. (IF THERE ARE OTHERS IN YOUR GROUP ALLOW EACH OF THEM TO INTRODUCE THEMSELVES.)

We are here today on behalf of (local) PTA and Texas PTA to visit with you about a few issues that are very important to our children and to children all across the state.

(Each person in the group can briefly discuss an issue. Texas PTA has a large agenda so you will want to identify 3 or so to discuss and mention that information about other priorities is contained in the material you are providing. Your legislator will likely have comments on the priorities, and may share advice with you about how to accomplish them, or may caution you about the challenges to achieving one or more of them.)

(Be mindful of the time. The meeting should not last more than 20 minutes or so.)

Senator/Representative _____ , Thank you for your time today and for your insights into our priorities. We hope you will support our efforts to accomplish these goals on behalf of Texas' children.

Appendix: Sample Thank You Letter

If sending from PTA letterhead:

The Honorable Representative [last name]

(Insert building and office number)

Austin, TX 78701

OR

The Honorable Senator [last name]

Insert building and office number

Austin, TX 78701

Dear Senator / Representative [last name],

As a member of the [name of] PTA, I would like to express my appreciation for the opportunity to meet with [Insert staffer's name] on [date of meeting/call]. I know your staff is very busy, and I was pleased that we were able to meet and discuss issues that are important to America's youth.

[Staffer's Name] and I had a productive conversation about [name of issue(s)] at a robust level.

I hope you can show your support for this [issue/program] by [action you want the legislator to take (signing a letter, voting for/against, etc)].

I look forward to continuing this relationship and to future meetings with both you and your dedicated staff. In the meantime, if I can be of any assistance, please do not hesitate to contact me.

Sincerely,

[Your name]

[Your Title]

[Your Contact Information]

Appendix: Advocacy Terminology

One of the most confusing things for new advocates to deal with is the jargon of government. This glossary contains definitions of terms commonly used in the lawmaking process and in advocacy.

Advocacy - Speaking out on issues of concern. This can mean something as formal as sitting down and talking to your legislator; as intensive as engaging in efforts to change a law or policy; or as simple as telling your neighbor about the impact of a law.

Amendment - A change to a bill or motion, sometimes replacing the entire bill (called a “substitution”). An amendment is debated and voted on in the same manner as a bill.

Appropriations - Basically, a fancy word for budget. A legislature’s appropriations committee will craft a bill that lays out how the government’s money should be spent for a given time period (usually a fiscal year), which is then voted on by the legislature and signed into law by the president or governor. Often, these bills are huge, and contain many “riders”

Authorization - Legislation that formally establishes a program or activity and sets its funding limit. Authorizations are often for a limited time, and programs must be periodically “re-authorized,” sometimes with changes.

Bill - Legislation drafted for consideration by the legislature. Bills usually must be formally filed with the legislature’s clerk and given an identifying number (H.R. 7, for example, is the seventh bill filed in the House of Representatives this session).

Committee - A group of legislators that develops legislation on specific topics (veterans’ affairs, for example), and has jurisdiction over all legislation that deals with its topic. Generally, legislation must pass in a committee before the entire legislative body can vote on it. Committees often schedule public hearings to discuss legislative issues. Most action takes place at the subcommittee level.

Congressional Record - The official transcript of federal House and Senate proceedings. Often includes statements by members that are added directly into the record, and not fully read on the floor in the interest of time and staying awake.

Conference Committee - The House and Senate appoint members to a conference committee to resolve differences between versions of legislation passed by both bodies. Both chambers then vote the combined legislation, which is called a “conference report.”

Continuing Resolution - Legislation passed by both the House and the Senate permitting executive branch agencies to continue operating in the absence of a budget.

Cosponsor - When a legislator supports a bill, but is not the primary sponsor, they may sign their name onto the bill as a cosponsor to show their support. Legislation can sometimes have hundreds of cosponsors.

District - The geographic area from which a U.S House member or state legislator is elected.

Electoral activities - Activities that directly attempt to influence the outcome of an election. Charities are strictly prohibited from engaging in electoral activities, although other types or nonprofits are not.

Executive Order- An action by the President or a Governor that has the legal authority of a law, often dealing with regulations or the workings of agencies.

Filibuster - Delaying tactic used in the US Senate by the minority in an effort to prevent the passage of a bill or amendment. The Senate’s rules allow for unlimited debate in some situations, unless a 2/3 vote to end debate passes. A filibuster results when one or more Senators continue “debating” for as long as possible (sometimes for days).

Grassroots Lobbying - Stating a position on a specific legislative proposal to the public, then asking the public to urge their legislator to support that stated position. Nonprofits are limited in the amount they can spend on grassroots lobbying.

Hearing - A meeting in which evidence to support particular points of view can be presented to a committee. Usually in conjunction with the consideration of a specific bill and can include experts on a specific topic, or members of the public who would be affected by the bill or issue at hand.

House - The lower body of the Congress, and most state legislatures. House members are elected to represent a geographic district. The US House (with 435 voting members and five nonvoting delegates) is much larger than the Senate (with 100 voting members), as is the case in most states.

Legislative Advocacy - Efforts to change policy through the legislative branch. May include formal lobbying in support or opposition to a bill, the crafting of new legislative language, writing amendments to existing bills, or encouraging others to contact their legislators.

Lobbying - Communication with elected officials or their staff, which expresses a position on a pending piece of legislation.

Majority Leader - The leader of the majority party in the Senate, elected by his or her peers. In the House, the Majority Leader is the second in command after the Speaker of the House and is also elected to that post by his/her peers.

Minority Leader - Leader of the minority party in the House and Senate, elected by members of his or her party.

Public Law - After a bill passes both the House and the Senate and is signed by the president, it becomes a public law.

Regulation - A rule or order that has the force of law that originates from the executive branch (usually from an agency), and deals with the specifics of a program. Congress, for example, may instruct EPA to reduce automotive emissions by 5%, but the EPA must develop regulations to reach this goal.

Roll Call - A formal vote on a bill or amendment taken by each legislator announcing “yea” “no” or “present” as their name is read by the clerk.

Senate - The upper body of the Congress, and most state legislatures. Each state has two US Senators, elected at-large, to serve six-year terms, with one-third of the seats up for re-election every two years. In state legislatures, Senators usually represent larger geographic areas than House members.

Speaker of the House - The “leader” of the House of Representatives, elected by the majority party. The speaker controls the calendar and other aspects of the House’s activities.

Sponsor - One or more legislators who are the primary writers of a bill. All bills must have at least one sponsor, but many have more than one primary sponsor, and a number of cosponsors as well.

Subcommittee - A part of a committee that deals with a specific issue within the committee’s jurisdiction (such as the veterans’ benefits subcommittee of the Veteran’s Affairs committee). Most legislation is first developed and voted on at this level, as a full committee will usually not consider legislation until it has passed its subcommittee.

Whip - Senator or Representative who serves as an internal lobbyist for the Republican or Democratic party to persuade legislators to support their party’s position, and who counts votes for the leadership in advance of floor votes. While the whip is an official position, there may be other members who act as a whip for specific legislation or issues.



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