

Advocacy Handbook 2019-2020



This handbook focuses on specific tasks required of advocacy or legislative chairs or vice presidents in local PTAs and councils. It also includes information about additional responsibilities that apply to elected board members.

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Table of Contents

1.	Introduction	3
2.	Duties of a nonprofit board member	3
3.	Nonpartisan advocacy for nonprofits	4
4.	Duties of a PTA legislative chair or vice president.....	5
	4.1 Share information	5
	4.2 Distribute the WSPTA issue survey	5
5.	First steps as an advocacy chair	5
	5.1 Begin the school year.....	5
	5.2 Where to find support	6
	5.3 Advocacy resources for local PTAs.....	7
6.	Suggested advocacy chair timeline.....	7
7.	How to advocate	11
	7.1 Start small	11
	7.2 Turning members into advocacy volunteers	12
	7.3 The busy person’s guide to advocacy	12
	7.4 Maximize effectiveness.....	12
	7.5 Using a webpage for advocacy	13
8.	WSPTA legislative program and legislative assembly.....	13
	8.1 WSPTA legislative program.....	13
	8.2 WSPTA Legislative Assembly.....	14
9.	Legislative basics	14
10.	Communicating with legislators	15
	10.1 Letter and email tips	15
	10.2 Telephone tips	16
	10.3 Meeting tips	17
11.	Nonpartisan policy	17
12.	Political campaign activities guidelines and restrictions	18

1. Introduction

For more than 100 years, PTA has advocated for the health, safety, welfare, and education of all children and youth and provided support to members so that they can speak with a powerful voice and be a relevant resource for parents.

The association was founded in 1897 in Washington, D.C., as the National Congress of Mothers. From the beginning, its founders were determined to eliminate threats that endangered children. Child labor laws were the first order of business. The mothers weren't alone – fathers, teachers, labor, and community leaders joined them and together they launched an organization that today is woven into the fabric of American life.

The National Congress of Mothers became the Congress of Parents and Teachers in the 1920s, but by whatever name it has been known, the Parent Teacher Association has continued to better the lives of children. PTA's public policy agenda focuses on involving parents in their children's education and addressing social problems that affect children and families.

PTA advocacy successes:

- Universal kindergarten
- A public health service
- Polio vaccinations
- Hot lunch program
- A juvenile justice system
- Mandatory immunization

From the beginning, PTA has advocated for a strong public school system to ensure equity and opportunity for all children. PTA has never lost sight of this goal and continues to flourish as an advocacy group operating at the national, state, and local levels - often within a school community, and in partnership with educators, legislators, and policy makers.

***Note:** In local PTAs and councils, individuals who are doing advocacy work may be known by many names, including advocacy chair, legislative chair, vice president of advocacy, legislative vice president, and so on. These positions may or may not be elected, in accordance with the standing rules of the local PTA or council. The terms that refer to these positions are used interchangeably in this handbook.*

2. Duties of a nonprofit board member

Each member of a nonprofit board has three legal duties, collectively known as her or his “fiduciary” duty. A fiduciary is a person who holds something in trust for another. A PTA board is charged with holding the well-being of the PTA in trust for its members. The three legal duties are:

- **Duty of Care:** to pay attention to the organization's activities and operations;
- **Duty of Loyalty:** to put the interests of the organization before personal and professional interests;
- **Duty of Obedience:** to comply with applicable federal, state, and local laws; adhere to the organization's bylaws; and remain the guardians of the mission.

Two Washington State PTA (WSPTA) resources directly address these legal requirements: *PTA and the Law* and *Managing Your Nonprofit PTA*. *PTA and the Law* is a class offered yearly across Washington state. It has accompanying resources available only through that class. One elected officer from every PTA must take *PTA and the Law* yearly, in accordance with the WSPTA standards of affiliation. *Managing Your Nonprofit PTA* is a handbook available on the WSPTA website. It is also a class that is commonly offered at region and/or council training. *Managing Your Nonprofit PTA* deals specifically with the financial duties of the board of directors.

3. Nonpartisan advocacy for nonprofits

PTA is nonpartisan and therefore shall have no connection with any political party or candidate for public office. This prohibition is imposed on PTA by federal law. PTA advocates must work with people from all political parties. Any can be allies on specific issues important to children and families. For more in-depth information about nonpartisan policy, see sections 11 and 12 in this handbook.

PTAs 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.

PTAs 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.

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.

4. Duties of a PTA legislative chair or vice president

4.1 Share information

- Share WSPTA advocacy news so members are aware of what their association is doing and how they can get involved. Check with the local PTA membership chair to make sure all member contact information is in the membership database so that members can participate in and be informed about advocacy issues.
- Encourage members to sign up for Action Alerts and to read the WSPTA blog.
- If a council is active in school district advocacy, share what it is doing or give members a link to the website.

4.2 Distribute the WSPTA issue survey

Every fall, the WSPTA advocacy committee and the WSPTA staff compile a survey of proposed platform issues. Voting delegates to the annual legislative assembly in October use the results of this survey to help determine how they will vote on behalf of their local PTA. It is essential that all members be given the opportunity to contribute their opinions.

5. First steps as an advocacy chair

Communication and team-building are key to successful advocacy. Build a team of advocates to maximize effectiveness and share the workload.

5.1 Begin the school year

- Report the name of the advocacy chair or vice president to the WSPTA office.
- Sign up for WSPTA online resources. All advocacy chairs should sign up for Action Alerts. Advocacy chairs with contact information in the membership database will be auto enrolled to receive the weekly Leadership News, which contains important information and news to be shared with committees and volunteers.
- PTAs should schedule agenda time for an advocacy update at each board and membership meeting. Prepare for the meeting by checking the WSPTA website and copying articles of interest from the WSPTA blog or other reliable sources. This is also a good time to announce upcoming town hall meetings or other events of interest or concern to members.
- Ask for space in the PTA newsletter or on the website for an advocacy column. Use the WSPTA blog for ideas. Also, contact the council or region advocacy chair for articles to share.
- Make sure the PTA has a budget for advocacy. It should include funds for copying, postage, attendance at legislative assembly and Focus Day, and other expenses.
- Plan to attend the annual legislative assembly in October. This is a one- or two-day gathering to share, debate, discuss, and decide the annual legislative priorities of WSPTA. It also includes informative workshops and dynamic speakers.
- Contact the local council or region legislative chair for information about orientation and training meetings.

5.2 Where to find support

WSPTA is divided into 13 regions. Each region has a region director (RD) and a region advocacy chair (RAC); some districts or geographic areas also have councils and council advocacy chairs. Below is an explanation of the various levels of support and organization in WSPTA advocacy. For more information, support, or assistance, contact the RD or RAC. Contact information can be found on the WSPTA website.

Region advocacy chair

- Educates local PTA advocacy chairs.
- Coordinates activities through the district or council.
- Works with local PTA and council advocacy chairs to provide information, resources, and training.
- Coordinates activities throughout the PTA region.
- Is a member of the WSPTA advocacy committee.
- Participates in the coordination of the annual legislative platform.
- Participates in legislative review and action.

WSPTA advocacy director

- Reviews and updates all advocacy handbooks, publications, resources, and trainings as requested by the WSPTA leadership director and/or WSPTA president.
- Serves as chair of the WSPTA advocacy committee. Sets meeting schedule and agenda for and attends all meetings of the WSPTA advocacy committee. Communicates regularly and works directly with region directors, region advocacy chairs (RACs) and service delivery teams regarding legislative and advocacy resources and opportunities.
- Coordinates legislative assembly in collaboration with the WSPTA president and staff.
- Coordinates Focus Day or other grassroots event in collaboration with the WSPTA president and staff.
- Works cooperatively with the WSPTA resolutions committee.
- Plans legislative and advocacy strategies that meet the identified needs of local PTAs and councils.
- Collaborates with the WSPTA leadership director on the implementation of a training/education program focused on identifying and meeting the legislative, regulatory, and public policy needs of local PTAs and councils.
- Acts as a resource to the WSPTA board of directors on matters that affect the legislative activities of local PTAs and councils.
- Prepares an annual report to the convention on the achievements of local PTAs' and councils' advocacy efforts.
- Attends the National PTA legislative training as requested by the WSPTA president.
- Serves as the WSPTA board of directors' voting delegate to legislative assembly.
- Represents PTA interests in Olympia and among government entities.
- Assists members with advocacy and legislative questions/issues.

- Assists WSPTA advocacy committee and board of directors on public policy and strategy.
- Communicates and engages with members in advocacy and legislation primarily through the WSPTA blog.

WSPTA board of directors

- Oversees PTA activities in the state.
- Sets policies for WSPTA.
- Develops training to assist local PTAs and councils to most effectively conduct their operations.

WSPTA executive director

- Oversees day-to-day operations of PTA.
- Responsible for PTA events and publications.
- Implements policy decisions approved by the WSPTA board of directors.

5.3 Advocacy resources for local PTAs

Website: Washington State PTA maintains an advocacy page on its website, which contains information about WSPTA positions and additional resources. (www.wastatepta.org)

WSPTA blog: The WSPTA blog provides information about advocacy issues and legislative news. It can be accessed from the front page of the WSPTA website. The blog informs members about budget and policy issues that affect children, as well as WSPTA’s advocacy efforts. Members can be referred to the blog, hyperlinks may be shared in articles, or articles may be shared on local PTA social media.

Leadership News: A weekly e-news publication sent to all WSPTA leaders containing information to share with committee members and volunteers.

National PTA public policy agenda: National PTA maintains advocacy information on its website detailing its public policy work. (www.pta.org)

6. Suggested advocacy chair timeline

This timeline is set up as a guideline of activities that may be pursued by advocacy chairs throughout the year. Use this resource as a starting point. Each PTA should adjust its advocacy work to fit the needs and resources of its membership.

July

- Transition with outgoing and incoming officers.
- Review any materials that came with the position. Materials should be updated monthly. (Ongoing July-June.)
- Verify that the PTA’s advocacy chair is registered with the WSPTA office and through the membership database.

- Schedule a meeting with local legislators while they are out of session and at home. Consider reaching out to other decision makers for the local area, such as school board members, city council members, or county officials. This is a great time to start forming relationships. Inform them of issues of interest and ask what they are working on. Try to set up regular meetings or phone calls. Each meeting should be attended by at least two PTA members. (Ongoing July- June.)

August

- Attend a region fall conference.
- Request time on the agenda for local PTA or council board and membership meetings. (Ongoing July-June.)
- Request space for a monthly article in the PTA newsletter/communication platform. (Ongoing July-June.)
- Encourage members to vote in the primary election. (First Tuesday in August.)
- Create a list of grassroots advocates in the school and/or community. These are people who volunteer to receive updates via email and call or write their legislators. Provide the region advocacy chair a copy of the list, including names and email addresses. (Ongoing July-June.)
- Consider holding a candidate forum in October.

September

- Encourage members to register to vote and have registration forms available at every meeting (available through county elections departments) or provide the link to the online voter registration at the Secretary of State's office. Provide forms to school offices and encourage high school students to register to vote. See <https://www.sos.wa.gov/> for voter registration deadlines.
- Verify that the PTA has a budget line item for legislative assembly. Plan to attend legislative assembly in October.
- Review newsletter content guidelines regarding advocacy and legislative issues.
- Prepare an article for the newsletter. (Ongoing July-June.) Include contact information and request that members sign up to help contact legislators during the legislative session that begins in January.
- Distribute the WSPTA legislative issues survey to PTA members.
- Ask the region or council advocacy chair to host an orientation meeting for legislative assembly.
- Plan to attend *PTA and the Law*.
- Continue to seek volunteers and develop an advocacy email list.
- At the secondary school level, encourage students to attend legislative assembly. If they are paid PTA members, they may attend and participate in the debate of issues.
- Attend council meetings and build a relationship with the council advocacy chair.
- Direct members to the WSPTA website to learn more about advocacy.

- Watch TVW. To get started, visit <http://tvw.org/>. The “channel locator” will indicate which channel broadcasts TVW in the local area. “Scout” allows selection of options to track specific legislation, watch video based on preferences, save video clips, and share video, documents or highlighted video clips via email, social media, or formal reports. This is an opportunity to observe House and Senate Education Committee meetings and hearings in Olympia without having to travel. Watch interviews of legislators on *Inside Olympia*; this is an opportunity to watch legislators in action.
- Review the WSPTA resolutions on the WSPTA website. Resolutions for consideration at WSPTA convention must be submitted by November 15.

October

- Collect the legislative issues survey data to determine the ranking of PTA’s legislative issues. Take this information to legislative assembly.
- Attend legislative assembly.
- Remind people to mail general election ballots by the first Tuesday in November.
- Continue to learn about local and state issues.
- Report legislative assembly results back to members, both at meetings and in a newsletter article.
- Hold a candidate forum.

November

- Encourage people to vote in the general election.
- Identify newly elected local officials and share that information with members.
- Approach legislators and share the results of the legislative assembly. Ask how they prefer to be contacted.
- Begin to review the local paper for information about issues to be addressed in January during the legislative session. Save articles to share with members.

December

- Distribute elected official contact information. Share the legislative hotline phone number to use during the legislative session. Give suggestions on how to communicate with legislators, and remind members to include their name and address in the email, so that legislators know they are constituents.
- Update the list of members willing to call or write their legislators.
- Watch the news for stories related to PTA issues.
- Submit articles for publication in the middle/high school newspaper.

January

- Legislative session begins.
- Inform members about, and plan to attend WSPTA Focus Day (held in January or February).
- Look for news articles about the legislative session.

- Provide members with the information needed to contact their legislators.
- Inform members about TVW.
- Subscribe to legislators' newsletters.
- Watch for announcements of legislator town halls; share information with members.

February

- Forward information from the region advocacy chair or WSPTA advocacy director to local contacts.
- Review the Washington state government website. (<http://www.leg.wa.gov>)
- Consider spending a day in Olympia speaking with legislators. "Shadow" another WSPTA volunteer.
- Encourage members to testify in Olympia.
- Check the TVW schedule. (<http://www.tvw.org>)
- Attend legislator town halls and report highlights to members.

March

- Continue to speak at monthly meetings.
- Stay updated about news and events in Olympia.
- Encourage members to contact legislators regarding key bills.
- Register to attend WSPTA Convention in late spring.

April

- During the odd years' longer sessions, the legislature is still in session in April. Continue to work closely with legislators to make sure they understand PTA positions on issues.
- Encourage members to write, email, and call their legislators regarding key bills.
- Begin to talk with PTA members about issues they feel need to be addressed next year. Consider submitting an issue or a resolution individually or on behalf of the PTA for the next WSPTA Legislative Assembly process. Check the advocacy page of the WSPTA website for submission details and to verify deadline dates.

May and June

- When necessary, transition with the incoming and/or outgoing PTA president or new advocacy chair.
- Contact the governor's office regarding specific bills and budget concerns.
- Submit any proposals to WSPTA. Priority issue proposals, resolution proposals, and legislative principle proposals are usually due June 1. Check the advocacy page of the WSPTA website for submission details and to verify deadline dates.

7. How to advocate

Advocacy means to speak up, to plead a cause, or to make a case for another person. Parents are advocates when they speak up for their child to her or his teacher, when they speak up for changes in curriculum at their school, when they speak up for a crosswalk to make it safer for children to cross the street, and when they speak up to reform the child welfare system.

PTAs support issues as varied as local efforts to improve school nutrition, state efforts to improve education funding, and national efforts to increase access to health care. PTA often assists in creating incremental solutions to big problems.

7.1 Start small

- If the PTA is new to advocacy work, start with issues that members can easily understand.
 - Is there a school issue that concerns PTA members? (Not enough arts? Has recess been dropped? Is there a safety issue?) PTAs can work with school administration (principal, building team, etc.) to help inform the school community and get PTA members involved in resolving the issue.
 - Often school issues are tied to district policies or budget decisions. If district parent advisory groups or committees working on district-level issues exist, a PTA can act as a liaison between these groups and parents. PTAs can also post links to school board information.
 - PTAs are not limited to school issues. Members advocate for community centers, quality childcare or after-school programs, sidewalks, and safe bike routes. PTAs advocate for the health, safety, welfare, and education of all children, striving to attain WSPTA’s vision that every child’s potential becomes a reality. The possibilities for advocacy are extensive and exciting.
- As an advocacy leader, share the answers to the following questions with members, to help strengthen the connections needed for effective advocacy:
 - When are the district’s school board meetings held? Are they televised? (Refer to the school district website or call the district office.)
 - Which state representatives and senators represent constituents in the PTA or school attendance area? What is their contact information? (Washington state legislature’s website: <http://www.leg.wa.gov>; click “find your legislator.”)
 - Which elected officials serve on the Senate or House Education Committees? (<http://www.leg.wa.gov>)
 - Who is the Washington State Superintendent of Public Instruction? (<http://www.k12.wa.us>)
 - When is the next meeting of the Washington State Board of Education? (<http://www.sbe.wa.gov/>)
- Where can PTAs find information about school performance? (Washington State Report Card: <https://washingtonstatereportcard.ospi.k12.wa.us/>) (School district fiscal information? <http://fiscal.wa.gov/k12.aspx>.)

7.2 Turning members into advocacy volunteers

The first step to building a volunteer network is to communicate local, state, and National PTA goals and tell members at each meeting how they can participate in the advocacy process. Bring issues and goals to the local level by telling members how the issues affect the community's children and schools. Explain to members that they are already engaging in advocacy efforts when they contact their child's teacher or principal.

Facilitate the process to make it easier for members to find information about local, state, and national PTA advocacy efforts. An email distribution list can help disseminate important information to interested parties quickly and efficiently.

Not all PTA members will be able to devote the same level of time or resources. When volunteers are offered a variety of opportunities, they can choose tasks that fit their situation and time constraints. Efforts may also be coordinated to allow members to easily participate. For example, if the PTA wants to educate the school board via a letter-writing campaign, make it easy for all members to do this at the next meeting by providing a sample letter, stationery, envelopes, and postage.

Keep volunteers involved in important issues by providing them with the latest information. Update the website and social media with links to WSPTA and National PTA and send regular updates via email or other communications.

Thank members and volunteers often and in public. Handwrite a note or print a certificate of appreciation to let volunteers know they make a difference and their efforts are appreciated.

7.3 The busy person's guide to advocacy

Estimated time	What can be done
1 minute	Leave a phone message.
5 minutes	Make a phone call.
5 minutes	Write a postcard.
10 minutes	Send an email.
30 minutes	Write and email a letter to the editor of the local newspaper.
30 minutes	Write and email a press release to the local newspaper.
30 minutes	Meet with a legislator (plus travel time).

7.4 Maximize effectiveness

A written plan will help focus advocacy activities. Identify PTA goals, organizational capacity, target audiences, potential allies, opposition, and the activities to be pursued.

Steps to developing an advocacy plan:

- Determine the issue.
- Build a volunteer network.
- Organize around goals.
- Identify targets and tactics.
- Build a coalition and maximize resources.
- Develop a message that resonates.
- Communicate to decision makers.
- Evaluate and celebrate efforts!

7.5 Using a webpage for advocacy

A well-planned and designed webpage is an efficient way to disseminate a large amount of information to members, targets, and the media. Local PTAs can use their websites to post information about issues and the effects of their advocacy campaigns. PTAs can also link to other organizations' sites, and they may allow other organizations to link to their site as well.

Note: A PTA website that is used for advocacy purposes must be independent of a school or school district website and may not be housed on a school district server. School resources, including websites, cannot be used for legislative advocacy purposes.

8. WSPTA legislative program and legislative assembly

8.1 WSPTA legislative program

The purpose of the WSPTA legislative program is to identify and promote the understanding of legislative priorities relevant to the vision, mission and goals of WSPTA. Legislative priorities shall be statewide in scope and topics shall include those relating to the health, safety, welfare and education of all children. Legislative priorities shall be identified through the WSPTA legislative principles, two-year legislative platform, resolutions and board positions.

Priority legislative issues (legislative platform): These are the top issues WSPTA will support during the upcoming legislative session. Individual members, local PTAs, or councils may submit proposals. The annual deadline is usually June 1 (be sure to check the WSPTA advocacy page for specific deadlines). After review by the WSPTA advocacy committee and the WSPTA board of directors, proposals that align with WSPTA's advocacy positions will be considered by voting delegates at the annual WSPTA Legislative Assembly. In even-numbered years (the beginning of the state biennial budget process), delegates vote for the top five priority issues. In odd-numbered years, issues will be reviewed by the delegates and approved issues will be added to the supported platform.

Legislative principles: These are long-term positions of WSPTA. They identify issues the association wishes to address, such as reducing high school drop-out rates. Often a legislative bill will address a legislative principle, but not solve the entire issue.

Resolutions: These statements outline the opinion and will of the association to address statewide problems. They are long-term positions that have been submitted to the resolutions committee by individual members, local PTAs, committees, or councils. After review by the WSPTA advocacy committee and the WSPTA board of directors, resolutions are voted on by delegates at either legislative assembly or convention. Resolutions are periodically reviewed to determine when they can be combined, amended, or recommended for retirement. The complete list of resolutions, as well as the submittal form, is available on the WSPTA website.

8.2 WSPTA Legislative Assembly

The WSPTA Legislative Assembly is held annually to determine the legislative priorities of WSPTA, to educate and mobilize advocates, and to advance WSPTA's legislative program.

The proposed legislative platform, along with an electronic or downloadable issue survey to be distributed to PTA members, will be posted to the WSPTA website by the end of August. Each local PTA and council should use these tools to inform their members about the proposed issues and seek input. This can be done during membership meetings. The survey can also be emailed or sent home via kid mail. (Always get school permission before using kid mail!)

How many delegates may a local PTA send to legislative assembly? The number of voting delegates a local PTA may send is based on the previous year's number of members. Each PTA is entitled to send a minimum of four voting delegates. PTAs with over 200 members are allotted additional delegates. The number of delegates per PTA is specified in the *WSPTA Uniform Bylaws* under Article 9, Legislative Assembly Section 2.D., Voting Delegates. Each council is also entitled to four voting delegates. PTAs and councils may send an unlimited number of non-voting delegates.

9. Legislative basics

- Washington has 49 legislative districts.
- Each district has approximately 137,000 voters.
- Each district elects one senator to a four-year term. Every two years, half of the Washington state Senate is up for election.
- Each district elects two representatives to two-year terms. Every two years the entire Washington state House of Representatives is up for election.
- General elections are held on the first Tuesday of November in even-numbered years for terms starting the following January.
- In odd-numbered years, the legislature's regular session is scheduled for 105 days. One of the primary requirements is to pass a two-year budget for the state.
- In even-numbered years, the legislature's regular session is scheduled for 60 days.
- The governor may call a special session of the legislature for up to 30 days. There are no legal limits to the number of special sessions that may be called.

- The Senate has 15 standing committees to deal with different issues. Each senator will be on several committees.
- The House of Representatives has 20 standing committees to deal with different issues. Each representative will be on several committees.
- Become familiar with how a bill becomes a law in Washington state. Share the process with members. See <http://leg.wa.gov/legislature/Pages/Overview.aspx>.

10. Communicating with legislators

The most important thing that PTA advocates can do to support WSPTA’s statewide lobbying efforts is to build strong relationships with local legislators. Legislators need to know that their local constituents care about the issues that PTA is supporting. They want to hear from individuals about how issues impact them personally.

WSPTA’s goal: To build a team of at least three people per legislative district to engage in ongoing conversations with their legislators. Start by forming a local team and visiting the legislator either individually or as a group when legislators are at home between legislative sessions. Legislators will often want to meet in a coffee shop, as many do not have offices outside of Olympia.

Establishing a relationship: Do some research on the state legislative website (<http://www.leg.wa.gov>) to learn about the legislator’s interests. Every legislator has a home page with background information. Read about the committees he or she has served on, sponsored bills, and voting records. Look for areas of common interest. Consider inviting a legislator to speak or answer questions at a local PTA or council event. Ask to be on email lists and receive updates. Share the current PTA platform and indicate an intent to follow up on specific bills during the legislative session. Members with specific areas of expertise may wish to offer to be a resource.

Report progress to the region advocacy chair and state advocacy director: Once advocacy chairs have met with legislators, they should call or email the region advocacy chair and WSPTA advocacy director to let them know who is on the legislative district team. The WSPTA advocacy director and committee may need to call on teams around the state for assistance.

10.1 Letter and email tips

- **Recognize that legislators are not experts:** They cannot possibly keep completely informed about all issues. They need education, supporting information, and referrals. Avoid using jargon, use specific examples, be factual, and think of the constituent (voter) impact.
- **Return address:** Put a return address on the letter, not just on the envelope. Envelopes are often thrown away before a letter is answered. Always use a home address in any email. Legislators want to know that the person writing is one of their constituents.

- **Identify the writer:** Writers should make it clear whether they are writing on behalf of themselves as constituents or as the advocacy chair of an association.
- **Identify the subject:** State the name of the legislation or the topic of the letter in the first paragraph. Include the bill number or some means of bill identification.
- **State a position:** Writers should explain how a bill would affect them, their family, their school, or even their state or community.
- **Be reasonable and honest:** Don't ask for the impossible and don't intentionally misinform a legislator. Don't threaten a legislator. Be firm, confident, positive, and courteous. Even if legislators do not agree with the position presented on one specific issue or bill, another point may be presented in the future on which they will agree.
- **Get to know staff:** Remember that staff controls the legislator's schedule, monitors the information received, and influences the legislator's decisions.
- **Keep it short:** Write about one issue only and express opinions concisely.
- **Ask for a reply:** Indicate to the legislator that a reply containing his or her position on the issue would be appreciated. Constituents have the right to know the views of their representatives.
- **Follow up:** If a legislator's vote on a bill pleases you, express thanks. Everybody appreciates a complimentary letter. Politely express dissatisfaction with votes that do not support a specific position.

10.2 Telephone tips

- **Be prepared:** Jot down a few quick notes before calling, to make sure the entire point will be expressed quickly.
- **Speak with the staff:** It is rare to speak directly to a legislator on the phone. Since the staff often has expertise that the legislator does not, and the legislator depends on the staff for information, speaking with a staff member is not "settling for second best."
- **Don't bully:** Yelling, screaming, and threatening are the surest ways not to be heard or helped. Stay as calm and rational as possible.
- **Ask for a response:** Callers should provide a name, address, phone number, and state that they are a constituent of the legislator. Ask the legislator to email information regarding the issue to see in writing where the legislator stands on an issue.
- **Be timely and start early:** To increase the impact of a call, contact the legislator early in the process.
- **Check in:** From time to time, it's helpful to see how an issue is progressing. This also provides an opportunity to build a relationship with the staff and the legislator.
- **Say thank you:** An honest "thanks" for assistance or interest in an issue is always the right thing to do. We are all human. "Thank you" makes people feel appreciated.

10.3 Meeting tips

- **Telephone for an appointment:** Call a legislator's office and ask for the appointments assistant to arrange a meeting with a legislator or the staff member who follows specific issues.
- **Identify the persons at the meeting:** Let the legislator's office know who they should expect to meet with. Constituent? Board member of an association?
- **Be prepared:** Know the key points to get across. Meetings are often interrupted, and someone may change the subject. Be ready to cite three or four important points.
- **Be understanding and able to discuss both sides of an issue:** The most effective advocates – those who gain and keep the ear of legislators– are sources of information, as well as opinion. Advocates gain credibility when they educate in one breath and persuade in the next.
- **Present accurate facts and good arguments:** Supporting or opposing a piece of legislation is not enough. It is important to do the best possible job presenting a case for or against that legislation.
- **Be realistic:** Most legislation is the result of compromise. It always has been so, and it always will be so in a democracy. Expect some give and take and be gracious.
- **Maintain contacts:** If legislators vote to support legislation you have advocated for, thank them for their support. If they vote against legislation you have advocated for, thank them for considering the views that were expressed. Then, focus on winning another day, another way. Look for angles and new developments that could change the minds of legislators.
- **Support your legislators:** If they are running for re-election and if you believe they deserve it, support them with your time and money — as an individual, not as a representative of PTA. Do not become aloof at the time when they need help the most.
- **Remember to thank them for their time:** After the meeting, write a thank you letter to each legislator you met. This is especially important if legislators and those in the meeting have different opinions. Thanking them for their time and mentioning the highlights of the meeting will build the credibility and relationship you may need in the future.

11. Nonpartisan policy

The following guidelines summarize the legal requirements governing political campaign activities by PTAs and are intended to assist PTA officers, directors, and volunteers in understanding those requirements to maintain their respective PTA's tax exemption. The guideline is a summary of those rules and a statement of PTA's philosophy.

- PTA represents parents and others concerned with the welfare of children and youth.
- PTA has been advocating for children's health, safety, education, protection, and general welfare for over a century.
- PTA representatives should conform to the requirements of the law, both in service to PTA and in their personal affairs. They should observe high standards of conduct so that the integrity, independence, and tax-exempt status of their PTA may be preserved.

According to the *WSPTA Uniform Bylaws* and National PTA policies, PTAs “may not, directly or indirectly, participate or intervene in any political campaign on behalf of, or in opposition to, any candidate for public office.”

This refers to every elected office, including school boards. This prohibition affects every local PTA, every PTA council, and WSPTA itself.

Officers and directors of the association must exercise caution in this area. The PTA can be jeopardized by inappropriate actions of officers, directors, or members of local PTAs or councils in the political area.

Any violation of this political campaign rule/law may result in fines, penalties, and/or revocation of the PTA’s tax-exempt status. Moreover, the Internal Revenue Service (IRS) will seriously consider complaints from the public that a charitable, educational, or social welfare organization is engaged in improper or illegal political campaign activity. Consequently, PTAs and their officers, directors, and volunteers must scrupulously avoid any appearance of political candidate campaign activity on the part of PTA.

12. Political campaign activities guidelines and restrictions

- **Endorsements:** PTAs may not make any statement (written or oral) supporting or opposing any candidate for public office. Thus, they cannot encourage votes for or against any candidate for public office, for example, via a speech or through an editorial position in a PTA newsletter or website. In addition, PTAs should avoid statements that indirectly support or oppose a candidate – for example, labeling a candidate as “pro-education,” using a + or – sign to evaluate candidates, or using biased voter education materials.
- **Financial and other support:** A PTA may not provide financial support to any candidate or political action committee (PAC) or political party. In addition, a PTA may not provide other forms of candidate support, such as volunteers, facilities, equipment, or mailing lists.
- **Partisan campaign literature:** A PTA may not distribute campaign literature that supports or opposes a specific candidate or political party. In addition, the distribution of candidate campaign literature on the premises of a PTA meeting should be avoided. Third-party distribution of campaign material on public property (outside the building during a PTA event) should not be viewed as a PTA activity since the PTA lacks authority to control access to public property. If the PTA invites or suggests such distribution, however, complaints could be raised about political campaign activity.
- **Voter education:** Voter education activity consists of distribution during an election campaign of newsletters, pamphlets or other materials that include candidates’ statements or voting records, or the results of candidate polls or questionnaires. Whether such distribution constitutes political activity depends upon the format and content of the publications and the manner of their distribution. All polls, questionnaires, voter guides, and voting records should be very carefully reviewed prior to publication or distribution.

- **Voting records:** The IRS has indicated that, during an election campaign, a PTA may distribute the voting records of all members of the legislature on a wide range of subjects, only if the structure and content of the materials avoids bias. Materials would likely be considered biased if they indicate or imply that a legislator agrees or disagrees with the association’s position, or that the association agrees or disagrees with the legislator’s vote.
- **Candidate questionnaires:** Polling or submitting questionnaires to candidates concerning their positions on issues is considered a **neutral activity**. It is only when the results of the polls or questionnaires are disseminated during a campaign that the issue of political activity arises. Results may be distributed to the general public as a voter guide during an election campaign provided the poll does not pose questions designed to make the candidate appear acceptable or unacceptable to the association; the poll or questionnaire covers a wide range of issues selected on the basis of importance to the electorate as a whole; and the results of the poll/questionnaire are reported in an accurate, unbiased manner.
- **Nonpartisan voter registration drives:** Both the IRS and the Federal Elections Committee (FEC) **permit** a charitable, educational, or social welfare organization to sponsor voter registration drives and encourage citizens to exercise their right to vote, provided no bias for or against any candidate or political party is evident. The FEC requires all materials prepared for distribution to the general public in connection with the drive to include the full names of all drive sponsors.
- **Nonpartisan public forums, debates, lectures:** A charitable, educational, or social welfare organization **may** sponsor an unbiased public forum, debate, or lecture in which candidates explain their views to the public. The sponsoring organization may not indicate its views on the issues being discussed, comment on candidates’ responses, or in any way indicate bias for or against any candidate.
- **Individual political action:** Officers, directors, and members of any PTA, acting in their individual capacity, may participate freely in the political process. However, given the absolute prohibition on political campaign activities by PTAs, care should be taken to ensure that no misunderstanding arises that individuals are acting as representatives of any PTA. For example, if a PTA official speaks at a campaign event supporting a candidate, he or she should not be introduced in her or his official capacity. Likewise, any written materials in which an individual’s name appears should not contain any mention of PTA or a PTA position held by the author.
- It is recognized that some PTA officers, directors, and volunteers may choose to participate on their own in the political candidate process. PTA officers must separate their identity with PTA when personally participating in any partisan campaigning. **This includes not mentioning the association (including a PTA title or affiliation) in any campaign activities.**
- **When campaign activities are involved, these rules should be observed:**
 - An officer, director, or volunteer of any PTA, acting solely in his or her individual capacity, **may** participate freely in the political process.

- However, in one’s official capacity as an officer, director, or volunteer, an individual **may not**:
 - Act as a leader or hold any office in a political organization.
 - Make speeches for a political organization or candidate or publicly endorse a candidate for public office.
 - Submit funds for or pay an assessment or make a contribution to a political party or candidate, attend partisan gatherings, or purchase tickets for partisan functions.
- **Penalties:** Because the political campaign activity prohibition is absolute, PTA must take the prohibition seriously. Any violation of the restriction may result in revocation of tax-exempt status. Moreover, additional financial penalties for violation of the political campaign activity restriction may be imposed on both the association and on its officers and directors.

These guidelines are designed to serve as a resource for local PTAs and councils of WSPTA. If there are questions or concerns, please contact the WSPTA office.