

# ADVOCACY

2023-2024

# RESOURCE GUIDE





# Table of Contents

About PTA	2
Leadership Competencies	3
Texas PTA Diversity, Equity, and Inclusion Policy	4
Standards of Continuing Affiliation	5
Importance of Advocacy Chair/Vice President	6
Getting Started	7
Keeping Records	9
Sample Plan of Work	10
How Do I Advocate?	11
Effective Advocacy at All Levels	12
Advocacy History of PTA	15
Legislative Basics	16
Submit & Promote Positions & Resolutions	18
Fiduciary Duty	19
Finance for Executive Board Members	20
Protecting Your PTA with Insurance	22
Training & Learning Resources	23
Texas PTA Staff and Board of Directors Support	25
Appendix I: Advocacy-Specific Resources	26
Appendix II: Start the Conversation	27
Appendix III: Sample Thank You Letter	28
Appendix IV: Advocacy Terminology	29
Appendix V: Bond Elections and PTA	31

Easy access to all of the live links in the Resource Guide are available at a scan of the QR code.



# 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.
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## VALUES

- **Collaboration:** We will partner with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone, without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward achieving our association's strategic initiatives.

## PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- Standard 1: **Welcome All Families** The school treats families as valued partners in their child's education and facilitates a sense of belonging in the school community.
- Standard 2: **Communicate Effectively** The school supports staff to engage in proactive, timely, and two-way communication so that all families can easily understand and contribute to their child's educational experience.
- Standard 3: **Support Student Success** The school builds the capacity of families and educators to continuously collaborate to support students' academic, social, and emotional learning.
- Standard 4: **Speak Up for Every Child** The school affirms family and student expertise and advocacy so that all students are treated fairly and have access to relationships and opportunities that will support their success.
- Standard 5: **Share Power** The school partners with families in decisions that affect children and families and together—as a team—inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborate with Community** The school collaborates with community organizations and members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



# Leadership Competencies

## Skills and Abilities Demonstrated by Effective Leaders

Successful leaders are effective leaders. Think of some of the most effective PTA leaders you have worked with. They fill their PTA role well, but their leadership capacity goes beyond that. They have skills and abilities that allow them to step into various roles. They see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to improve continually.

Texas PTA has identified a set of competencies that effective leaders demonstrate. Current and potential leaders can use these skills and abilities to improve their leadership. Local or Council PTA nominating committees can use them to recruit, nominate, and elect effective leaders. The competencies also drive our Full Circle Leadership Development program.

This list is by no means exhaustive. Rather, it is representative of the qualities PTA leaders demonstrate in the work they do to make every child's potential a reality.

Competencies	Descriptions
<b><i>Integral to All Categories</i></b>	
Communications	Listens actively and conveys information clearly, concisely, and accurately in both writing and speech
<b><i>Adaptive</i></b>	
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Continuous Learning	Pursues the development of skills and knowledge
<b><i>Forward-Thinking</i></b>	
Critical Thinking	Obtains all relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
Motivation	Demonstrates and promotes interest and enthusiasm
Vision	Demonstrates a clear understanding of the future and how to get there
<b><i>Interpersonal</i></b>	
Collaboration	Works as a team to achieve a common purpose, putting service before self
Initiative	Steps up unprompted and goes above and beyond with excellence
Relationship Building	Develops trust and mutual respect, and values diversity
<b><i>Intrapersonal</i></b>	
Empathy	Expresses verbal and nonverbal recognition of feelings, needs, and concern for others
Integrity	Does the right thing when no one is watching
Self-Awareness	Assesses their own strengths and weaknesses
<b><i>Technical</i></b>	
Delegation	Shares responsibilities, including guidance and follow up
Time & Resource Management	Effectively prioritizes and manages the resources to accomplish the goals of the group or project



# Texas PTA Diversity, Equity, and Inclusion Policy

This Policy has been developed by the Texas PTA Diversity, Equity, and Inclusion Task Force, adopted by the Texas PTA Board of Directors (“Board”), and is intended to be consistent with the National PTA’s Diversity, Equity, and Inclusion Policy. This policy is also designed to further the commitment of Texas PTA to diversity, equity, and inclusion: To continually be a voice for all children by reflecting diversity and inclusivity in our membership, leadership, program content, advocacy, training, partnerships, and communications.

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Effective Date:** This policy was amended as of May 23, 2023, shall be reviewed by the Board every two years, and shall remain in effect until amended or replaced in its entirety as a result of action by the Board.

**Scope:** This policy shall guide Texas PTA, its Board, all constituent divisions (Local PTAs and other divisions, including Council PTAs), and their respective members.

**Definitions:** For the purpose of this policy:

- *Diversity* is the representation of and respect for people from different backgrounds and identities—including but not limited to race, ethnicity, culture, religion, socioeconomic status, age, geographic area, sexual orientation, gender identification, language, approaches to learning, diagnoses, or exceptionalities impacting learning or access to learning, and physical appearance. It also involves bringing different ideas, perspectives, lived experiences, talents, values, and worldviews to represent the wide variety of children, caregivers, educators, and communities within the PTA family.
- *Equity* provides fairness and access to resources, opportunities, and outcomes so that all communities are provided with what they need to be engaged and successful. This moves beyond an “equal across the board” approach to include the following:
  - a) Recognize and address bias and privilege.
  - b) Understanding and attending to specific individual and community needs, providing additional resources to those with greater needs.
- *Inclusion* is actions, behaviors, and social norms that strive to ensure all people feel safe, welcomed, and accepted. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with an equal voice and a right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

**Policy:** Texas PTA, its Board, and its constituent divisions (Local PTAs and other divisions, including Council PTAs) shall:

- Promote and encourage awareness, inclusion, and engagement of all diverse populations represented in the community.
- Openly assess beliefs and practices to ensure inclusiveness and equity and to guard against discrimination.
- Strive to ensure that the membership, leadership, programs, partnerships, and published materials reflect the diversity of their communities.
- Facilitate communication with families in their communities in languages they understand to the extent possible.
- Identify and address barriers that hinder inclusivity.
- Foster programs and practices that eliminate bias, prejudice, and misunderstanding.
- Advocate for funding, laws, and regulations that support programs, policies, and services that meet the health, safety, and educational needs of all student populations in Texas public schools.
- Provide resources and training that develop a more diverse and inclusive group of members, leaders, and community.

*Texas PTA first adopted a Cultural Diversity and Inclusion policy on July 26, 2012.*

# Standards of Continuing Affiliation



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Each membership year, Local PTAs must meet **both** of the following requirements to attain Active Status with Texas PTA. The membership year begins on August 1.

1. Remit to Texas PTA state and national membership dues for at least 20 members.
2. Submit to Texas PTA the name and contact information (mailing address, phone number, and email address) of at least one current executive board member, preferably the president.

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Local PTAs must comply with **all** of the following standards to remain in Good Standing with Texas PTA. Local PTAs that do not maintain Good Standing will be subject to a Local PTA Retention Plan as described below.

1. Maintain Active Status with Texas PTA.<sup>1</sup> (see requirements above)
2. Report all additional members and remit state/national dues to Texas PTA each year.
3. Submit to Texas PTA the name and contact information for all additional executive board members within 15 days of election or appointment.<sup>2</sup>
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.<sup>3</sup>
5. Each year, within 60 days of fiscal year-end, electronically file and have accepted by the IRS the appropriate "Form 990 Return of Organization Exempt from Income Tax".

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## **Local PTA Retention Plan (initiated when a Local PTA does not maintain Good Standing)**

**Notification:** Texas PTA will notify the PTA of the actions required to attain Good Standing. The PTA will have 30 days from the date of the notification to meet all Good Standing requirements to avoid moving into the Restriction Phase.\*

**Restriction:** While in the Restriction Phase, the PTA is not eligible for awards, programs, or grants administered by Texas PTA or National PTA. The PTA will have 30 days to meet all Good Standing requirements to avoid moving into the Restructure Phase.

**Restructure:** For PTAs that do not attain Good Standing following the Notification and Restriction Phases, Texas PTA may begin the process of restructuring the leadership of the PTA or revoking the PTA's charter. A PTA that signs an Action Plan may temporarily move into Intervention, giving them time to resolve any outstanding issues. The PTA will continue to be ineligible for awards, programs, and grants administered by Texas PTA and National PTA until Good Standing is achieved.

**Intervention:** Once in the Intervention Phase, Texas PTA will assign a support team to assist the PTA. If all Action Plan requirements are not resolved by the agreed-upon date, the PTA will be moved back into Restructure. *\*With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.*

1. *Active Status is used to determine eligibility in many Texas PTA programs and services. Please reference specific program eligibility requirements to ensure your PTAs participation.*
2. *PTAs submit executive board member information to Texas PTA electronically via the Texas PTA website.*
3. *Bylaws are submitted via the Bylaws Submission Form found on the Texas PTA website.*
4. *Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS.*

# Importance of Advocacy Chair/Vice President

Texas PTA is the second-largest child advocacy association in the nation and the largest in Texas. The advocacy chair position is essential to the make-up of PTA. As advocacy chair, you will help guide and strengthen the focus of the mission of PTA through advocacy awareness and action locally, state-wide, and nationally. An ideal advocacy chair is a strong communicator who isn't shy about discussing the needs of PTA with elected and appointed officials who have the authority to affect change. At the same time, an effective advocacy chair is also able to engage parents, families, and community members in order to develop a plan to address their ideas and needs. All advocacy chairs are essential links in the communication chain and are critical to accomplishing the mission of PTA.

# Getting Started

Advocacy is at the core of our PTA mission to make every child's potential a reality. By engaging and educating members on important issues at the local, state, and national levels, PTAs become important voices in guiding decisions that impact Texas families.

## Quick-Start Actions

- Work with the outgoing Advocacy VP/Chair to review ongoing efforts and needed materials.
- Develop a plan of work and submit it to the executive board for approval.
- Subscribe to Texas PTA's Under the Dome newsletter at [txpta.org/newsroom](http://txpta.org/newsroom) to receive advocacy-related communications.
- Review Texas PTA's and National PTA's [Legislative Positions](#), [Resolutions](#), and [Legislative Priorities](#).
- Sign the [Confidentiality, Ethics, and Conflict of Interest Agreement](#) and submit it to the Secretary.
- Complete all mandatory [FOUNDATIONS](#) training within 30 days of election or appointment.

## Advocacy Chair Responsibilities

- Identify policy issues of interest to your PTA membership and monitor through local and national media, school district policies, school board meetings, and PTA resources.
- Advocate for policies aligned with Texas PTA's [Legislative Priorities](#) at [txpta.org/legislative-priorities](http://txpta.org/legislative-priorities).
- Present legislative reports at all membership and executive board meetings.
- Provide members with contact information for elected officials while sharing action alerts and encouraging participation.
- Meet with elected officials at least annually, ideally before the start of and in between legislative sessions.
- Network with PTA advocacy leaders in your community to collaborate on common goals.
- Promote and participate in Texas PTA's bi-annual [Rally Day](#) and Straight Talk events.

## Advocacy Chair Timeline

### First Steps:

- Look for training opportunities at LAUNCH, with your Field Service Representative, or Council PTA (if applicable).
- Form a committee to assist with advocacy work.
- Develop your plan for the year and complete your plan of work.
- Identify funding options for your activities, especially for Rally Day attendance.
- Sign up for action alerts at [txpta.org/take-action](http://txpta.org/take-action).
- Familiarize yourself with Texas PTA legislative positions, resolutions, and priorities.
- Identify your state representative and state senator before the start of the session. Legislative sessions begin in January in odd-numbered years.
- Create a binder with issue information, representation information, and voter registration cards (only if you are a qualified volunteer deputy registrar).
  - *Note: It is a state law that all Texas high schools hold at least two voter registration drives each year on campus. Additional information regarding these drives is available from the [Texas Civil Rights Project](#). Check your local high schools for more information.*
- Share updates and alerts with members through committee reports at all meetings of the PTA and using all communication tools at hand, including but not limited to social media, school and PTA newsletters, and marquee.

## Annually

- 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 other communication methods.
- 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.
- *From May through July*, advertise advocacy sessions being held at LAUNCH.
- Attend LAUNCH.

### **In Terms that Begin in Even-Numbered Years**

- *In November*, reach out to legislators about meetings for Rally Day.
- *In December and January*, review webinars and other guidance for Rally Day preparation.
- *From January to June*:
  - Support Texas PTA's legislative agenda.
  - Respond to alerts from Texas PTA and encourage your members to do so.
  - Promote and attend Texas PTA Rally Day in Austin.
  - Confirm funding options for attendance at Rally Day. Be sure to work with your ways and means or fundraising VP/chair to coordinate your efforts.
  - Follow the timeline for Rally Day preparation.
  - Challenge other 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.

### **In Terms that Begin in Odd-Numbered Years**

- After the legislative regular session and any special sessions conclude, meet with your legislators in their district office about the recent session.
- Share information about new laws with members.
- *In January and February*, promote and participate in the Texas PTA Straight Talk event.

### **Experienced Advocacy Chairs**

- Follow the actions of your school board, especially budget drafting, which typically begins in January for the upcoming fiscal year.
- Consider volunteering for your Site-Based Improvement Team or School Health Advisory Council.
- Host a candidate or issue forum. Your executive board needs to approve questions to be used at the forum.
- Develop a candidate questionnaire and publicize the candidates' responses. Your executive board needs to approve questions to be used on the questionnaire.
- Have voter registration forms available at all PTA/PTSA meetings for public access. Only Volunteer Deputy Registrars are allowed to assist with completing voter registration forms.
- Educate candidates about PTA issues.
- Remember to keep it nonpartisan, non-secular, and open-minded.

# Keeping Records

Compiling and maintaining a complete record of your activities can help the PTA Leaders who follow behind you. Passing important information to your successor gives them what they need to get started. A PTA should follow its records retention policy to be sure they are properly storing the records they need to maintain regulatory compliance.

## How to Compile Your Records

Ask yourself, "If I knew nothing about the job, could I do it with this information?" Depending on your position, you may need hard copy materials at your fingertips. If so, use a loose-leaf folder or binder with tabbed dividers. Other positions could easily keep their records electronically via cloud-based storage or on a USB drive.

## Suggested Content

### *Bylaws/Standing Rules*

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. Each year (after August 1), any registered executive board member can download a copy of your PTA's bylaws and standing rules from Texas PTA. They should be distributed to all executive board members and reviewed annually. Visit [www.txpta.org/bylaws](http://www.txpta.org/bylaws) for the request form and more information.

### *Rosters*

- Current roster of executive board members, with their contact information
- Contact information for your Texas PTA Field Service Representative, Council of PTAs (if applicable), Texas PTA Board of Directors with comparable responsibilities, and the Texas PTA State Office
- Resources, related agencies, and organizations in the community relevant to your position

### *Items Related To Your Position (As Applicable)*

- Description and responsibilities of your position
- Current Texas PTA FOUNDATIONS Basics Resource Guide(s)
- Plan of work approved by the executive board
- Reports prepared for meetings (executive board, membership, and committee)
- Financial records, including approved budgets, detailed reports with copies of funds request forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, and so on
- Award applications submitted to Council, Texas, or National PTA
- Summary of your term, including recommendations for the following year

### *PTA Meetings*

- Agendas and approved minutes from each meeting
- Financial reports
- Relevant committee reports
- Information on upcoming events and programs sponsored by PTA at all levels
- Record of volunteer hours to be reported to the volunteer coordinator (if applicable)



# Sample Plan of Work

## *Muestra Plan de Trabajo*

<b>Executive Board Member Name:</b> (Nombre del Miembro de la Mesa Directiva)			
<b>Position:</b> (Posición)	Advocacy Chair	<b>Year:</b> (Año)	

*Reproduce as needed for the appropriate number of goals.*  
(Reproducir según sea necesario para el número apropiado de metas)

<b>Responsibilities / Duties:</b> (Responsabilidades/Obligaciones)	Communicate information to the executive board and members on important legislative activities affecting education Foster participation in the political/legislative process.	<b>Committee Members:</b> (Miembros del Comité)	Interested parents, students, and community members.
<b>Goal:</b> (Meta)	Increase participation by executive board members and PTA members who contact their elected officials to advocate for PTA positions.	<b>Evaluation Process:</b> (Proceso de Evaluación)	Response to calls to action and members and PTA members who contact representatives

Specific Action Steps (Pasos de Acción Específico d)	Start Date (Fecha de Inicio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
Create an email distribution list for legislative news and send a call for action items.	September	September	\$0
Write email newsletters to inform members of legislative action related to PTA priorities and inform/encourage voting in elections.	September	Ongoing	\$0
Send out a 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) and Straight Talk (in even-numbered years). For Rally Day, consider arranging transportation.	October	March	\$0-\$500
Find volunteers for forums (can be held jointly with other organizations, such as the League of Women Voters).	September	April	\$0-\$100

<b>Resources:</b> (Recursos)	Council Representative, Texas PTA Field Service Representative, former members active in legislatures, current district legislators, legislative aides, newspapers, League of Women Voters, legislative blogs and websites
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# 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, social media posts, 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:

<b>Estimated Time</b>	<b>What You Can Do</b>
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.
10 minutes	Post to social media.
30 minutes	Email a letter to the editor of the PTA newsletter.
30 minutes	Email a letter to the editor of the local paper.
30 minutes	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.

## Contact Your Elected Officials

Whether you are writing a letter/email or calling your legislator, review the following tips recommended by the National Education Association:

- **Keep it brief:** Discuss one bill or issue in a letter/email.
- **Identify Yourself:** Include your name and the 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 if 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 the correct title of Senator or Representative, and include “U.S./Texas House of Representatives” or “U.S./Texas Senate.”

In an email, make sure that you:

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

When Texas PTA issues a call to action, we often provide sample letters/emails 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 want to comment.
- Be sure to thank them for their time and consideration.

# Effective Advocacy at All Levels

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

## As a PTA, we may:

- Take positions on education and child advocacy issues, including initiatives and referendums 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 encouraging individuals to register to vote and encouraging voter turnout.
- Identify issues affecting your campus or community and address them with your campus, district and/or other authorities.
- Arrange, support, sponsor, and advertise public information forums.
- Educate members on various issues and their impact, including local issues like bond elections. (See Appendix IV: Bond Elections and PTA.)
- 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 nonpartisan races, such as the school board.

*Note: Any PTA member who supports or opposes 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).*

## Select 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?

## Research the Issue

Once you have chosen your issue(s), it is imperative that you thoroughly research the issue:

- 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.

## Organize 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 most to lose
- Targets - people who can affect the outcome of the issue (school boards, legislators, voters, influential organizations)
- Tactics that fit the goals and involve many people in a variety of activities

## Develop the Plan

An effective advocacy campaign uses activities and events to keep the PTA issue on the radar and draw 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 your members feel about the specific issue.
- 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 outreach.

### **Use the Media**

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

- Newspapers: Consider press releases, news stories, press statements, letters to the editor, and op-eds (opinion editorials). Get to know the editorial board and reporters who cover the issues of importance to the PTA.
- 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, and so on. 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 for the most up-to-date, factual information.

### **Communicate with Your Elected Officials**

Elected officials are people just like us. They care deeply about their community, want to represent their district well, and need to know how community members feel.

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 five months during odd-numbered years, 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 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 one state senator, one state representative, and possibly more, depending on the location of your campus.

### **Use the Interim Period to Develop a Relationship with Your Legislators**

- Co-host with Texas PTA a recognition event for your legislator if they receive Texas PTA Champions for Children recognition.
- Consider giving one or more of your legislators a Texas PTA Honorary Life Membership.
- Invite legislators to speak at PTA meetings once school is in session. Have them share their agenda, and talk to them about Texas PTA's agenda and your community's issues.
- Invite legislators to attend special events at your school, community events at which they can 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.

*Note: Once the election season has begun, however, it is important not to show favoritism to any one candidate.*

### **Schedule a Legislative Office Visit**

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

- Call the Representative's or Senator's district office and ask for their scheduler. Be prepared to state the purpose of your visit; for example, to discuss issues of interest to Texas schoolchildren. Confirm you are a constituent and a member of Texas PTA.
- Confirm the address of their local office, and obtain directions if necessary.

- Ask if there are any special things that you should keep in mind for the meeting, including appropriate dress or if a receptionist will greet you.

### **Master 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 PTA, Council PTA, and Texas PTA's current legislative priorities. Consider providing Texas PTA's past successes and priority fact sheets. All are available on the Texas PTA website at [txpta.org/state-advocacy](http://txpta.org/state-advocacy).
- Create an agenda for the meeting and make assignments. If you are taking a group, plan to review the agenda with the group before the meeting.
- The purpose of the meeting is to establish a relationship with your legislator.
- If you can, determine if the legislator has a connection to PTA. If so, note this in your opening remarks, and legislators should be thanked for any support of previous issues of which you are aware.
- For group meetings, group leaders should make introductions and begin the meeting by thanking legislators or aides for their past support, if applicable. The leader should then 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 a legislator or a staffer. If meeting with a staffer, make your presentation as though you are talking with the legislator. Staffers, especially senior staff, have a great deal of responsibility and significant knowledge of major issues. They can often influence the legislator's positions, priorities and votes.

### **It's "GO" Time**

The meeting day has arrived! Remember, your goal is to set the tone for a strong relationship with your representatives or 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 legislators about your PTA and school and about the initiatives that Texas PTA has pursued. Thank them for their service to Texas.
- Stick to the agenda, and remember that you represent the entire organization's views. 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 and offer their viewpoint and voting record.
- If a legislator is "on board" with our issues, ask for their 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 arguments. State the Texas PTA positions simply. You may have to agree to disagree. Always be cordial and courteous - no exceptions. We are here to provide a viewpoint from their constituency and 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 the names of staff members with whom you meet.

### **Follow-Up - It's Key**

This last step is important. Be sure to follow up with your legislator and their staff. To effectively advocate, having several points of contact before the next legislative session begins is key.

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

# Advocacy History of PTA

PTA is the largest child advocacy association in the nation. Advocacy has been an essential 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 issues include:

## Health & Wellness

- Abolition of the public drinking cup
- Creation of vaccination requirements
- Creation of birth certificates
- Creation of a child welfare commission
- More stringent laws concerning sex offenders
- Adequate child labor laws
- Prohibition of sales of fireworks
- Increased anaphylaxis preparedness and EPI pens on public school campuses
- T-21, raising the age to purchase tobacco products
- Juvenile justice reform

## Education

- Creation of public kindergarten
- Compulsory school attendance
- Proper construction of school buildings
- Strengthening/enforcing teacher certification, salaries, tenure, and retirement
- Creation of school lunch program
- Teacher pay raises
- Transformation of the school funding system
- Increased emphasis on school safety
- Funding of school-based health clinics
- Including school supplies in the annual tax-free holiday
- Requirement of site-based decision-making committees on all campuses
- Reduction in the number of End-of-Course Exams required to graduate
- Active opposition to vouchers

## Safety

- School zone speed law
- Restriction of children riding as cargo in the back of pickup trucks
- Requirement of seat belts for all children ages 4-15 in passenger vehicles
- Requirement of city buses used to transport school children to display a caution sign and blinking lights
- Statewide safety standards for playgrounds
- Graduated Driver's Licenses for teenagers
- Booster Seat Bill
- Cell phone prohibition for driving teens
- Bullying/Cyberbullying legislation

## Miscellaneous

- Married women's property rights bill
- Allowing jury service for women

For a detailed list of our current legislative priorities, positions, and resolutions, visit [txpta.org/state-advocacy](http://txpta.org/state-advocacy).

# 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 occurs 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 on 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-person, 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 powerful individuals in the legislature are the chairmen of the House and Senate committees and subcommittees. After legislation is assigned to a committee, the committee leadership and members 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 chairpersons of the committees and subcommittees, which routinely deal with legislation about the welfare and education of children.
- In the Texas Legislature, the following committees study “children” legislation:
  - 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 that the Governor proposes.

### *Types of Legislation*

- Bills are how laws are made. They must be written and sponsored by someone, and 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 that, because of its importance, length, or complexity, is submitted in writing. Resolutions seek to address problems, situations, or concerns that affect children and youth and require action for a solution.

## PTA Representatives

Take time to familiarize yourself with the districts and representatives for your PTA membership. If your PTA is part of a Council, check to see if they have a list of the district's legislative delegation. A map of districts and representatives is online at [house.gov/representatives/find/](http://house.gov/representatives/find/). Providing this information for each representative/district to your PTA membership is a great way to begin engaging parents, families, and communities to advocate for all students.

Potential information to provide is:

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

Many representatives have e-newsletters. Subscribing to these newsletters keeps you 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 your legislators.

As an Advocacy chair, you should recruit Rally Day participants and coordinate Rally Day participation. The following tips will help you effectively prepare for Rally Day:

- Attend the Rally Day webinars (dates are posted on the Texas PTA website):
  - Getting Started – Planning for Rally Day: What is it, and how do you 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 preparing 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 the Under the Dome newsletter at our Texas PTA website, [txpta.org/newsroom](https://txpta.org/newsroom), for updates.
- Stay connected through our communication channels (BAND, Facebook, Twitter, Instagram, and TikTok).
- Promote, register, and arrange for travel and other logistics for Rally Day.

### **Straight Talk**

Texas PTA understands advocating for students happens every day, every year. Texas PTA does not sit idle or stop advocating in non-legislative years. In even-numbered years, we hold a Straight Talk event to expand our knowledge in specific areas of concern. As an Advocacy chair, you should encourage Straight Talk participation.

The following tips will help you effectively prepare for Straight Talk:

- Coordinate a watch party for PTA leaders and members.
- Coordinate snacks and/or goody bags to encourage participation.
- Consider contacting community or district-level experts on the Straight Talk topic to speak before or after the virtual event.

# Submit & Promote Positions & Resolutions

You can 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 a Resolutions Toolkit inside their Advocacy Toolkit that assists with the process of submitting a resolution.

## Resolutions

A resolution is an original main motion that, because of its importance, length, or complexity, is submitted in writing. Resolutions seek to address problems, situations, or concerns that affect children and youth and require action for a solution.

Resolutions usually consist of two parts:

- Whereas Clause(s): Preamble or introductory statement that contains the background information and reasons for the resolution. Each statement of information or rationale is listed separately and begins with "Whereas."
- Resolved Clause(s): The request for action. Each action has its own "resolved" clause.

## Legislative Positions

A legislative position is a statement that outlines the association's opinion, will, or intent 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; however, the position is sometimes maintained, even when action has been taken, to substantiate the continuing will of the association.

Legislative positions usually consist of a single statement that lists the new law or requested change to an existing law. For more information on forming and submitting position statements and resolutions, visit [txpta.org/advocacy](http://txpta.org/advocacy) and/or National PTA's Advocacy web page, [pta.org/home/advocacy](http://pta.org/home/advocacy).

## Submit Proposed Resolutions or Positions

Local PTAs, Council PTAs, or the Texas PTA Board of Directors may submit resolutions or legislative positions. The Texas PTA Board of Directors considers all submissions bi-annually upon the recommendation of the Advocacy Committee. Submissions must be received at the Texas PTA State Office no later than November 15th in odd-numbered years.

## Criteria for Consideration

- Further the mission of the PTA.
- Be aligned 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 feasible for Texas PTA to undertake.
- Be adopted by the membership of the submitting PTA.
- State a position not previously adopted by the Texas PTA.

## Submission Requirements

- A cover sheet completed and signed by the submitting PTA. The cover letter must include the signatures of the PTA president and secretary, and indicate the date on which the proposal was adopted by the membership of the submitting PTA.
- resolution or legislative position language
- table of contents for supporting materials
- rationale statement (one page or less) summarizing the issue and the need for the requested action
- background materials, documenting each "whereas" clause in a resolution or each statement in a legislative position. Note: This material should indicate that the submitting PTA well researched in the subject and should be sufficient to give a person with no previous knowledge of the subject enough information to make an intelligent decision. The material must be unbiased and well-balanced and may include PTA-related information, such as statements or policies; copies of document research; pertinent laws, surveys, or statistics; and copies of relevant articles from publications. Newspaper articles and editorials alone are not sufficient background material.

## Emergency Resolutions or Legislative Positions

PTAs that want to propose an emergency item must submit the proposal to the Texas PTA State Office no later than June 15th in even-numbered years. The issue must have arisen after the published November 15th submission deadline to be eligible for emergency consideration. If approved by the Texas PTA Board of Directors, a two-thirds affirmative vote of the delegate body is necessary to consider the emergency item.

# Fiduciary Duty

The Internal Revenue Service (IRS) (as included on Form 990) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including executive board member “fiduciary duty.”

Fiduciary duty is a legal responsibility to act in the best interest of another person. Fiduciary implies a level of trust that is necessary to represent our members.

Executive board members have three fundamental fiduciary duties:

- The **duty of care** means that an executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the daily operations of the PTA.
- The **duty of loyalty** requires an executive board member to operate in the interest of the PTA and not to use their position to further a personal agenda.
- The **duty of obedience** requires an executive board member to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS and the Texas State Comptroller’s Office. Obedience to governing documents requires a deep understanding of the operating documents (bylaws, standing rules, policies, executive board resource guides, and required Texas PTA training). Finally, obedience requires that an executive board member not act outside the scope of the PTA’s legal documents.

Fiduciary duty in PTA means the executive board members act as trustees of the organization. This includes exercising due diligence to oversee that the organization is well-managed and that its financial situation remains sound.

# Finance for Executive Board Members

## Financial Considerations

Every executive board member should be knowledgeable about the financial responsibilities of the PTA. Below is basic information on finances that every executive board member needs to know. There is much more involved in the daily financial management of a PTA...these are the basics.

## Budget Basics

The budget is a financial representation of the activities and operations a PTA expects to conduct during the PTA's fiscal year. An adopted budget must be in place at all times for fundraisers to be conducted and expenses to be paid. The budget for the following year is presented and adopted by the membership at the last membership meeting of the year. It is amended at the first membership meeting of the next fiscal year based on approved plans of work submitted by the incoming executive board. The membership always approves expenses and income via the budget, which can be amended as needed.

## Payments

Payments are never made in cash, and signed blank checks are never handed out. All payments must relate to an adopted budget line item and have a [funds request form](#) attached with a receipt and/or invoice.

## Deposits

To protect the PTA and its volunteers, PTA funds should always be counted and verified by the signature of two individuals on the Deposit Form found at [txpta.org/treasurer](http://txpta.org/treasurer). All signers should retain a copy or image of the completed deposit form. The treasurer may be one of the two counters unless prohibited by the PTA's standing rules.

All money should be deposited in the bank on a daily basis. Never deposit money in a personal account or leave the money in someone's home. Cash should never be taken from an event's collected money to use to pay expenses, reimburse individuals, or use as start-up cash for a later event.

## Banking

PTA money cannot be mingled with other funds and must be kept in a PTA bank account at a financial institution. The money of another group or organization is never deposited into a PTA account. Any request to use a PTA bank account is unacceptable and possibly illegal, even if it costs the PTA no money. Money can never be "turned over" to the school and/or principal to spend at their discretion.

## Financial Reports

To keep members informed, a financial report is presented at every regular executive board and membership meeting. The report covers the financial transactions since the last meeting of that type. The report should include each budget line's current period actuals, year-to-date actuals, and adopted budget amount. The verbal report should include the starting balance, total income, and expenses for the current period, change to sales tax liability during the current period, change in state/national dues liability during the current period, ending cash balance, and ending balances of the sales tax liability and state/national dues liability accounts. Your financial software may refer to liabilities as escrow or off-budget. As the funds belong to the members, they have the right to access the financial reports presented at any membership meetings. See a sample financial report at [txpta.org/treasurer](http://txpta.org/treasurer).

## Statement Reviews

The president appoints a member, subject to the executive board's approval, who is not authorized to sign on the bank account to review each PTA account statement. The statement reviewer utilizes the [Texas PTA Statement Review by Non-Signer Form](#). The secretary presents the result of this review at the next executive board meeting. If the reviewer identifies items for further review on the Statement Review by Non-Signer form, these items should be investigated by the executive board. The results of the investigated items should be attached to the Statement Review by Non-Signer form. If evidence of theft, fraud, or embezzlement is discovered, the Theft, Fraud, and Embezzlement Policy found at [txpta.org/policies](http://txpta.org/policies) should be followed.

## State and National Filing Requirements

The executive board verifies that all filing requirements and tax obligations are completed. At a minimum, this includes filing the IRS Form 990 and having proof of acceptance by the IRS within 60 days of the PTA's year-end.

## **Financial Reconciliation**

A financial reconciliation is required to be performed: at the end of the fiscal year, when any authorized check signer is added or deleted on any bank account, and at any time deemed necessary by the president or three (3) or more members. The president appoints the financial reconciliation committee consisting of no fewer than three (3) members who are not authorized signers, the current secretary, the incoming treasurer, a majority of student members related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report is adopted by a majority vote of the members at the regular membership meeting immediately following the financial reconciliation.

## **Financial Mismanagement**

Mistakes in managing the PTA's finances can occur, and sometimes a trusted individual will take advantage of their role in the PTA for their own financial benefit. It is important to seek help from your Council president or FSR as soon as possible to limit any additional losses to the PTA. If theft, fraud, or embezzlement is suspected, the PTA is required by the bylaws to follow the Texas PTA Theft, Fraud, and Embezzlement Policy found at [txpta.org/policies](http://txpta.org/policies).

## **Financial Red Flags**

- Bank statements are not seen by the treasurer and nonsigner monthly.
- Financial reports are not given at executive board or membership meetings.
- The beginning balance of a financial report doesn't agree with the last reported ending balance.
- Amounts in the financial reports do not balance the total.
- Money is counted by only one person.
- Checks or deposits are missing.
- Checks are made payable to a check signer's family members.
- Checks are made payable to "Cash."
- Checks are payable to the same payee made out for the same amount each month.
- Two or more signers on the bank account are related by blood, marriage, or reside in the same household.
- Receipts are missing from funds request forms.
- The membership did not approve the budget.
- The membership did not approve fundraising activities.
- The amount of profit doesn't agree with the amount in the contract signed with the fundraising company.
- Less money was deposited for a fundraiser than paid to the company for the product received.
- Bills are received for unbudgeted items.
- Individual PTA members profit monetarily from any fundraiser.
- Children are used to raise funds for PTA.
- The required annual financial reconciliation report was not presented to the membership at the first membership meeting of the new year.
- The financial reconciliation committee consists of signers on the bank account or of individuals related to those signers.

## **IRS 990 Filing Requirements**

All PTAs are classified as tax-exempt 501(c)(3) nonprofits under the Internal Revenue Code and must submit a 990 return to the IRS. Texas PTA requires PTAs to electronically file the appropriate IRS Form 990 and have it accepted by the IRS within 60 days of the PTA's fiscal year-end. PTAs must file one of three IRS Form 990s annually:

- The 990-N is required for PTAs whose gross receipts are \$50,000 or less.
- The 990-EZ and Schedule A are required for PTAs that gross more than \$50,000 but less than \$200,000.
- The 990 and Schedule A are required for PTAs who gross \$200,000 or more.

Proof of the 990 filing is presented at the first executive board meeting of the year. For more details on financial procedures for your PTA, visit [txpta.org/treasurer](http://txpta.org/treasurer).

# Protecting Your PTA with Insurance

Texas PTA strongly encourages PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement, or dishonest acts.

Texas PTA negotiated a group discount with Association Insurance Management (AIM) (800-876-4044) to obtain insurance coverage at affordable prices. Similar coverage may be obtained from any insurance company, locally or otherwise.

AIM offers several types of coverage listed below, and PTAs may secure any combination of coverage at any time during the year. Additional information may be found at [txpta.org/pta-insurance](http://txpta.org/pta-insurance).

## Event/General Liability Coverage

- \$1,000,000 or \$2,000,000 liability coverage per occurrence (no deductible)
- Protection from lawsuits if someone is injured at one of your events
- \$5,000 per person medical payment included (no deductible)
- Option for increased medical payments: \$10,000, \$25,000, and \$50,000
- Option for Media Liability to cover misuse of the content on your PTA website or social media
- Option for Hired and Non-owned Auto Liability
- Option for Abuse and Molestation Coverage

Event/general liability insurance covers carnivals, bounce houses, dunking booths, fun runs, skating parties, auctions, and more.

## Directors & Officers Liability Coverage

- \$1,000,000 liability limit (no deductible)

If someone sues the officers of your PTA for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions, this coverage pays to defend them against those actions.

## Embezzlement Coverage (Fidelity Bond)

- Coverage available: \$10,000 to \$250,000 (usually based on annual revenue)
- \$250 deductible

Embezzlement insurance covers monetary losses sustained by a PTA through any fraudulent or dishonest act(s) or embezzlement committed by any of the elected officers, members, volunteers, or employees.

*Note: For embezzlement insurance to apply, a PTA must have account statements reviewed monthly by a non-signer and conduct an annual financial reconciliation.*

## Business Personal Property Coverage (Inland Marine)

- Coverage available: \$10,000 to \$250,000
- \$250 deductible

Property insurance covers items such as raffle merchandise, auction items, and fundraising supplies while in your PTA's care, as well as your PTA's personal property like popcorn machines, school store supplies, emergency relief supplies, and more.

# Training & Learning Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, all required training is located at [txpta.org/courses](http://txpta.org/courses). Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong PTAs.

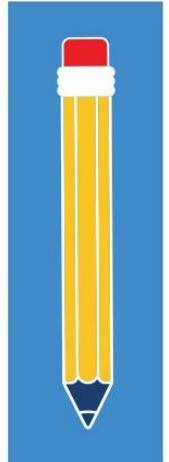
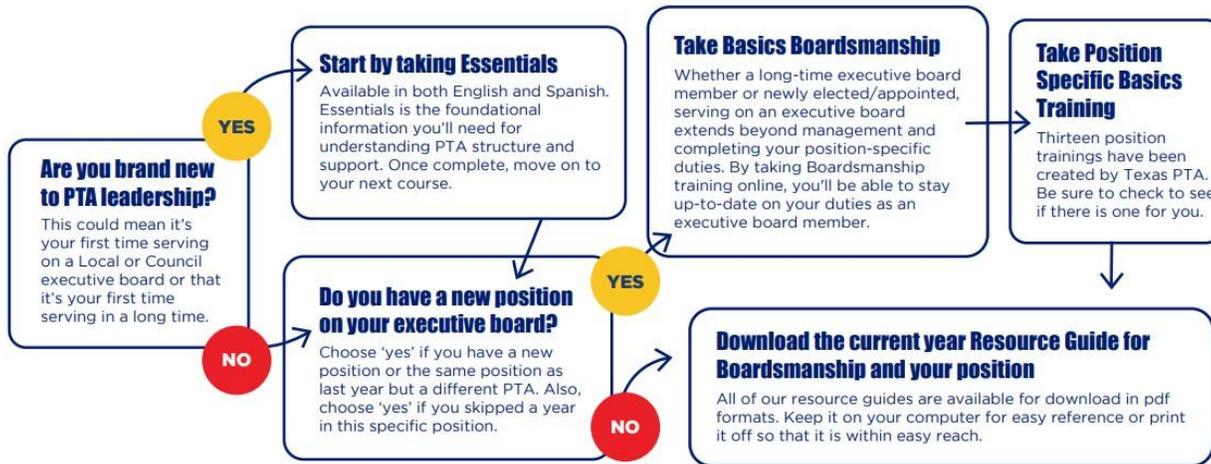
## FOUNDATIONS Required Training

- **Essentials** is a high-level orientation to PTA, taken online via the Texas PTA website at [txpta.org/pta-training](http://txpta.org/pta-training). It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation (FLO) and Leadership Orientation Training (LOT)) again whenever the training is updated.
- **Basics** courses contain detailed information to support PTA Leaders in their executive board position. Every executive board member must attend a Basics course for their position at least once every two years. These training sessions are available on-demand at [www.txpta.org/courses](http://www.txpta.org/courses). Basics content includes an online training video, a companion Resource Guide, and other supporting resources.
  - a. PTA Leaders can access the Resource Guides via the Texas PTA website. Visit [txpta.org/local-pta-leaders](http://txpta.org/local-pta-leaders) to download free PDFs.

Reminder: Both Essentials and Basics courses are mandatory for executive board members. The path to ensure that all required training has been completed is explained in the following graphic.

## PTA Online Training | Where Do I Start?

*Texas PTA requires all Local and Council board members to complete FOUNDATIONS Essentials training once in their PTA career. Position-specific Basics Training should be completed each time a PTA executive board member changes positions or campuses. All trainings can be found online at [txpta.org/courses](http://txpta.org/courses).*



## FOUNDATIONS: Spotlights

Spotlight courses offer short, in-depth reviews of important topics and recurring PTA functions, such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and optional, but offer vital insights on specific and timely topics.

## Newsletters and Alerts

Texas PTA provides content-specific newsletters based on your PTA position. Registering as an executive board member with Texas PTA each year helps ensure you receive important updates and position-specific newsletters! Visit [txpta.org/officer-intake](http://txpta.org/officer-intake) to access the form.

All executive board members are encouraged to closely follow Texas PTA legislative advocacy efforts by subscribing to Under the Dome, our advocacy newsletter, at [txpta.org/newsroom](http://txpta.org/newsroom). You can sign up for advocacy

Action Alerts at [txpta.org/take-action](https://txpta.org/take-action).

### **Leadership Development Resources**

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered result from polling PTA leaders across the state.

All PTA leaders are encouraged to visit [txpta.org/leadership](https://txpta.org/leadership) to discover Extra Credit courses to continue their leadership development and to investigate the Full Circle Leadership program.

# Texas PTA Staff and Board of Directors Support

## **BOARD OF DIRECTORS** | [txpta.org/bod](https://txpta.org/bod)

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the directors at large, Texas PTA Board members can help answer your questions and address your needs. You can reach them at the address above.

## **COMMUNICATIONS** | [communications@txpta.org](mailto:communications@txpta.org)

The Communications team manages and produces all Texas PTA communications, including *The Voice* (our quarterly newsletter), specialized newsletters (advocacy, healthy lifestyles, arts in education, environmental awareness, membership, and field service), social media outlets, and the Texas PTA website. They also serve as Texas PTA's contact for all media inquiries.

## **FINANCE** | [finance@txpta.org](mailto:finance@txpta.org)

Texas PTA understands the responsibility of managing your member dollars. The Finance team is charged with monitoring Texas PTA resources according to the annual budget, as adopted by the Board of Directors.

Members of the Finance team are also available to support PTA leaders in their compliance with state and federal financial requirements, such as filing the annual 990 with the IRS and sales tax filings with the State Comptroller.

## **LEADER ENGAGEMENT** | [leaderengagement@txpta.org](mailto:leaderengagement@txpta.org)

The Leader Engagement team gives direct support to PTA leaders and members. They assist with standards of continuing affiliation, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

## **MEMBER RELATIONS** | [memberrelations@txpta.org](mailto:memberrelations@txpta.org)

The Member Relations team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary, and secondary. Staff assists with member recruitment strategies, processes membership rosters and dues, and coordinates membership awards and the distribution of membership cards to Local PTAs.

## **PROGRAMS** | [programs@txpta.org](mailto:programs@txpta.org)

The Programs team is focused on connecting PTA members and leaders with the information they need to be successful and develop programs. The Programs team is your contact for student and staff programs, such as Reflections, Texas PTA's scholarship, and ed

# Appendix I: Advocacy-Specific Resources

Scan the QR code to access the list of links.

- [Follow Bills in Congress](#)
- [Follow Bills in Texas Legislature](#)
- [Texas PTA Priorities Bill Tracker](#)
- [Find your Officials and Candidates](#)
- [Texas League of Women Voters](#) (voter information)
- [Texas Primary Voters Guide](#)
- [Texas Voter Registration Site](#)
- [Texas Education Agency](#)
- [U.S. Department of Education](#)
- [State Board of Education](#)



## **Texas PTA Events and Training Opportunities ([txpta.org](http://txpta.org)):**

- Texas PTA Advocacy Page
- Under The Dome e-Newsletter
- Texas PTA Social Media (Facebook, Twitter, Instagram, Band)
- Rally Day
- Straight Talk
- LAUNCH

## **National PTA Events and Training Opportunities ([pta.org](http://pta.org)):**

- National PTA Advocacy Webpage (Advocacy Toolkit)
- Advocacy e-Learning Course
- National PTA Legislative Conference

# Appendix II: Start the Conversation

## HOW TO START THE CONVERSATION 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 policymaker about the issues that matter most to you and to Texas PTA.

Use the following sample script to 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 (\_\_\_\_\_) PTA and Texas PTA to visit with you about a few issues that are very important to our children and to children across the state.*

Each person in the group can briefly discuss an issue. Texas PTA has a large agenda, so you should identify up to four to discuss. 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.

*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 III: 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 Texas children and 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 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 IV: Advocacy Terminology

One of the most confusing things for new advocates is government jargon. This glossary contains definitions of terms commonly used in lawmaking and 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, the budget. A legislature’s appropriations committee will craft a bill defining how the government’s money should be spent for a specific period (in Texas it would be a biennium or two years). This budget is then voted on by the legislature and signed into law by the president or governor. Often, these bills are huge and contain many additional provisions (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 (for example, veterans’ affairs), and has jurisdiction over all legislation that covers 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.

**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 on the combined legislation called a “conference report.”

**Continuing Resolution** - Legislation passed by both the House and 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 of nonprofits are not.

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

**Filibuster** - Delaying tactic used in the U.S. 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 Congress and most state legislatures. House members are elected to represent a geographic district. The U.S. House (with 435 voting members and five non-voting 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. This may include formal lobbying in support or opposition to a bill, crafting new legislative language, writing amendments to existing bills, or encouraging others to contact their legislators.

**Lobbying** - Communication with elected officials or their staff, expressing a position on pending 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 or her peers.

**Minority Leader** - The leader of the minority party in the House and Senate, elected the party's members.

**Public Law** - After a bill passes the House and Senate and is signed by the president or governor, 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 the Environmental Protection Agency (EPA) to reduce automotive emissions by five percent, 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 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 reelection 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.

**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 House Committee on Veterans' Affairs). Most legislation is first developed and voted on at this level, as a full committee will usually not consider the 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.

# Appendix V: Bond Elections and PTA

Periodically, a school district may seek to issue a bond to address the needs of the district that cannot be met through the collection of property tax dollars designated for the public school district. The issuance of the bond must be approved on a ballot by the voting public. PTAs can be very helpful by working with the school district to conduct information sessions on the bond issue.

The Council PTA may also hold an election to determine if the PTAs will collectively support or oppose the bond.

## Overview

Voting to support or oppose a bond should be conducted as follows:

1. The Council PTA will serve 30 days' notice of a bond election and recommended action to Local PTAs at a council meeting by way of a motion.

*Example: "Superior ISD Council of PTAs moves to support the 2017-2018 bond referendum for Superior ISD in its entirety."*

In addition to the proposed motion, they must also provide documentation that outlines the bond referendum's components. Conducting a bond forum provides an excellent opportunity to share details and ask questions about the bond.

2. The PTA delegates must return to their respective campus PTA and gain direction on how to vote - support or oppose. This must be done at a membership meeting, not an executive board meeting. Based on the direction given at this meeting, the delegates will vote accordingly at the next council meeting (see the voting rules).
3. The outcome of the vote at the Council meeting determines whether the PTAs in the Council collectively support or oppose the bond.

## Voting Rules

As with any PTA election, there are stipulations on approving a motion. With this particular election, the vote must be by majority vote. However, if the bond is controversial or the vote is particularly close, the PTA may choose to show a super majority by asking for a 2/3 vote. This applies to both the Local PTA's and Council PTA's vote on the bond referendum.

Each Local PTA, in good standing with the Council, will have one vote and will cast that vote as they were directed by their membership. If they did not hold a membership vote, they must abstain.

## PTA Behavior (dos and don'ts)

Regardless of the outcome of the vote at the Council meeting, if your PTA is not in agreement with the position of the official Council vote, your PTA members must remain silent. Local PTAs are not allowed to promote or speak out in opposition to the position of the final Council vote. This is the same behavior expected of Texas PTA regarding National PTA positions and resolutions.

If your PTA is in support of the position of the official Council vote, your PTA leaders and members may demonstrate this support through usual communication channels, including the posting of yard signs, buttons and/or t-shirts, and so on.

If the Council decides not to take a position, a Local PTA may take a position as an individual PTA. The position must be put before the membership with notice given of the vote. After the vote is taken, the PTA can support or oppose the bond as directed by their membership, stating that it is will of the Local PTA and not the larger Council PTA.

## Timeline

The legislature only allows matters requiring a vote at the school district level to occur in November and May, so Councils should be aware of their timeline. For example, Superior ISD Council of PTAs meets on the first Wednesday in September, November, January, March, and May. The following sections describe the timelines for when notice/decisions/voting are needed in November and May:

### November Voting for Bond Referendum

- If the election is the first Tuesday in November, then the council vote should take place in September. This timing provides sufficient time for publicity purposes, if warranted.

- The likelihood that the bond referendum details will be available six months prior is unlikely. However, if they are, then in May, the Council would serve notice to their delegation. The delegation would go to their PTAs for instructions on how to vote. This may be problematic because some PTAs may have already met for the last time for the current fiscal year. As a result, the delegation will be new in September, and thus not authorized necessarily, or required, to vote as the previous delegation would. In this case, special meetings would need to be called in early September through October to support the November vote.

### **May Voting for Bond Referendum**

- Based on the timing of the election and the need for publicity, the council vote should be in March.
- The meeting notice is served in January.
- Between January and March, the delegates return to their PTAs to gain direction on voting.
- The challenge, again, is the availability of information on the bond referendum that far in advance.
- The most likely scenario would be to call a special meeting in early February (when information is more likely to be available), serve notice of the intent to support or oppose the contents of the bond referendum, and then conduct the vote in March.
- The Council must consider all Locals and when their membership meetings may occur. Each Local's full membership often only meets every other month.





Texas PTA



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