1. Welcome to PTA Advocacy

For more than 100 years, the 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 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 include:

- Universal Kindergarten
- Seat Belts on Buses
- A public health service
- Polio Vaccinations
- Hot Lunch and Breakfast Programs
- 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 with a school community, and in partnerships with educators and legislators, as well as 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 presidents, and so on. These positions may be elected, or they may not be, 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 non profit board member

Each elected member of a nonprofit board has three legal duties, collectively known as his or her “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 New Jersey PTA resources directly address these legal requirements: Leadership Handbook, and Treasurer Handbook.
3. Nonpartisan Advocacy for Non Profits

PTA is nonpartisan and, as such, shall have no connection with any political party or candidate for 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 section 11 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 Chairman or Vice President

4.1. Share Information

- Share state advocacy news so members are aware of what their association is doing and how they can get involved.
- Sign up for the PTA Takes Action at PTA.org for National PTA updates

4.2. 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 leadership (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 there are district parent advisory groups, or committees working on district-level issues, 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 child care or after-school programs, sidewalks and safe bike routes. PTA advocates for the health, safety, welfare and education of all children, striving to attain New Jersey PTA’s vision that every child’s potential becomes a reality. The possibilities for advocacy are extensive and exciting.
5. **First Steps as an Advocacy Chairman**

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

Begin the school year

- Make sure the membership chair has reported the name of the advocacy chair or vice president to the NJPTA office.
- Sign up for NJPTA online resources.
- PTAs should schedule agenda time for an advocacy update at each board and membership meeting. Prepare for the meeting by checking the NJPTA website or articles of interest from the newspaper. 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.
- Make sure the PTA has a budget for advocacy and legislation. It should include funds for copying, postage, attendance at legislative events, and other expenses.
- Plan to attend the annual legislative day in October and in the Spring. It includes informative workshops and dynamic speakers.

Many resources and tools for member advocates are available on the NJPTA website. These include:

- Voter registration information: Includes information about voter rights, as well as the election and vote tabulation processes.
- Advocacy action plan: A planning tool for local PTAs wishing to develop a grassroots advocacy campaign.
- Advocacy toolbox: A list of necessary items for an effective advocate.
- Guidelines for using “kid mail”: How to communicate with parents legally and effectively.
- Guidelines for the use of public facilities in advocacy efforts.
- Conducting a PTA endorsement: A step-by-step guide to the issue endorsement process.

6. **How to Advocate**

Advocacy means to speak up, to plead a cause, or to make a case for another. 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.

As effective advocates for children, 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.

As an advocacy leader, you are invited to answer the following questions to help strengthen the connections needed for effective advocacy:

- When are your district’s school board meetings held? Are they televised? (Refer to the school district website or call the district office.)
- Who are the state representatives and senators representing the constituents in your PTA or school attendance area? What is their contact information?

The first step to building a volunteer network is to clearly communicate the local, state, and National PTA goals and tell members at each meeting how they can participate in the advocacy process. Bring the issues
and goals to the local level by telling members how the issues affect the community’s children and schools. Explain to them 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 on 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 they are offered a variety of volunteer opportunities, they can pick which task fits their individual situation and time constraints. Efforts can 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 those who have volunteered to help involved in important issues by providing them with the latest information. Create and maintain an up-to-date website with links to New Jersey PTA and National PTA and send regular updates via email or other communication platforms.

Thank your 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. Legislative Basics

- New Jersey State has 30 legislative districts.
- Each district has approximately 219,797 voters.
- Each district elects one senator to a four-year term. Senators serve four-year terms, except in the first term of a new decade, which only lasts for two years. The "2-4-4" cycle was put into place so that Senate elections can reflect the changes made to the district boundaries on the basis of the decennial United States Census.
- Each district elects two Assembly members to two-year terms. Every two years the entire Washington State Assembly is up for election.
- General elections are held on the first Tuesday of November of odd-numbered years for terms starting the following January.

8. Communicating with Legislators

The most important thing that PTA advocates can do to support our 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.

New Jersey PTA’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. They will often want to meet in a coffee shop, as many do not have offices outside of Trenton.

Establishing a relationship: Do some research on the state legislative website to learn about the legislator’s interests. Every legislator has a home page with background information. Read about the committees they
have served on, bills they have sponsored and their voting records. Look for areas of common interest. Consider inviting them to speak or answer questions at a local PTA or council event. Ask to be on their email list and to receive their updates. Share the current PTA platform and indicate an intent to follow up on specific bills during the legislative session. Those with specific areas of expertise may wish to offer to be a resource.

Report progress to the state legislative activities chairman: Once advocacy chairs have met with legislators, they should call or email the state legislative chairman to let them know who is on the legislative district team.

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: Letter writers should make it clear whether they are writing on behalf of themselves as constituents or as the legislative 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 way they can identify which bill is being addressed.
• State a position: Letter 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, there may be another point presented in the future on which they will agree.
• Get to know staff: Remember that they control the legislator’s schedule, monitor the information received, and influence the legislator’s decisions.
• Keep it short: Write letters about one issue 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 your thanks. Everybody appreciates a complimentary letter. By the same token, politely express dissatisfaction with votes that do not support a specific position.

Telephone tips
• Be prepared: It is helpful to jot down a few quick notes before calling, to make sure the entire point is 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 mail 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 good 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.

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: Make sure to know the key points to get across. Meetings are often interrupted, and someone may change the subject. Be ready to give 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 your 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. Everyone likes to feel appreciated. This is especially important if legislators and those in the meeting have different opinions. Thanking them for their time and mentioning the highlights of your meeting will build the credibility and relationship you may need in the future.

9. **Nonpartisan Policy**

According to your Local PTA Bylaws, New Jersey PTA 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 in this association; every PTA council; and the New Jersey PTA itself.

Officers and directors of the association must exercise caution in this area. By virtue of holding an elected PTA position, 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. The IRS is intent on closely monitoring the political arena for any indication that charitable, educational, and social welfare organizations, such as PTAs, have engaged in improper or illegal political campaign activities.
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.

The following guidelines summarize the legal requirements governing political campaign activities by PTAs and are intended to assist the officers, directors, and volunteers in understanding those requirements in order to maintain their respective PTA’s tax exemption. The guideline is a brief abstract 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.

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:
  o Act as a leader or hold any office in a political organization.
  o Make speeches for a political organization or candidate or publicly endorse a candidate for public office.
  o 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.