

New York State

PTA

everychild. onevoice.



***Training for Region Board Members:
Building your advocacy initiatives***

Susanne Smoller

Legislation Coordinator

legislation@nyspta.org

Agenda

- Review RD survey
- SWOT Analysis for Advocacy Planning
- Strategy Chart
- Ways to advocate
- Advocacy calendar
- Resources

What is advocacy?

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

National PTA: <http://pta.cms-plus.com/files/2014%20Advocacy%20Brochure.pdf>



2015-16 Region Directors Advocacy Needs Survey

Please describe what advocacy efforts your Region has engaged during the past year?

- Hosted advocacy breakfast (3)
- Promoted/attended unit/council advocacy events and campaigns (1)
- School board brunch (1)
- Attended School Board Association Talk on GEA funding issues for local regions
- Submitted Resolution to National PTA (1)
- Sent people to National Legislation Conference (2)
- Founders Day (1)
- Advocacy program/workshop
- Weekly e-newsletter highlighting PTA news at all levels with call to action when needed
- Encouraged letter writing campaigns to legislators in Albany using PTA links/letters
- We have shown how to use the Engage/Capwiz website at our meetings/trainings.
- Sent people to Leg/Ed (1)
- Attended Lobby Day (1)
- Held Resolution/Advocacy workshop in Fall (1)
- Attend NYS PTA Convention (1)
- A Region Advocacy Committee that meets periodically and presents up to date info at Board meetings. (1)
- Facebook posts
- Partnership with school boards association legislative team
- Supported a local website whose primary goal has been to educate the local community on importance of having GEA repealed
- Submitted resolution (1)
- We share the information received.
- PTA Partnership Dinner guest speaker always education based
- We participated in the governor's task force remotely.
- We participated on a committee with Senator Funke, who was looking to close schools on election days.
- We post to Facebook and send out communications on critical votes or other advocacy sent out by National and NYS PTA
- None (1)

Does your Region sponsor an annual advocacy event? If you do, please identify the kind of event.

- Advocacy/Legislative Breakfast (3)
- Joint breakfast with another Region (1)
- School board brunch (1)
- Sponsor a legislative event during February with school boards association
- Advocacy workshop during our summer leadership training event
- Local PTA Units & Councils in the region sponsor meet the candidates nights in their respective districts.
- Ithaca Council sponsored a meet-and-greet with new administrators and new PTA officers within Ithaca City School District in October 2015 at start of school year.
- Our Council sponsors a candidates night, and we're encouraging our larger centrals to do something similar. We used to sponsor a legislative breakfast, but found ourselves unable to get legislators to attend
- No (3)

What requests for assistance regarding advocacy have you received from local Councils and Units?

- Unit and councils occasionally offer keynote speakers as presenters to participate in region advocacy events. (1)
- Not much/none (2)
- Writing resolution (2)
- Questions regarding any negative effects/ outcomes due to test Opt-out. (1)
- Asking Region to put word out regarding events run by other grassroots advocacy groups in our communities. (1)
- Updates on issues
- Ways to deal with their unit issues
- Making sure they are staying true to the PTA mission
- Request for greater clarity and succinct summaries of some of the State PTA positions on Important State issues such as Common Core implementation, meetings with the new Commissioner, etc.
- Meet the candidates night
- Units looking for clarification for parents.
- We get questions about how to respond to test refusal efforts. We get questions regarding how to respond to school administrators who want PTAs to take positions on Reform Agenda type issues.

What does your Region need in order to fulfill the advocacy needs of Units and Councils?

- We need more clear and decisive positions of the NYS PTA on various advocacy issues (ex. state funding, the opt-out movement, the Governor's budget, etc.). Our units and councils want to see what NYS PTA stand is.(1)
- Not sure (2)
- More units to come to trainings (1)
- Training
- We have strong advocacy team in Region (1)
- A clear, always up-to-date, and brief NYS PTA position on each of the ongoing hot topics so units do not improvise when asked questions by parents.
- Possibly short, to the point video clips we can share or post on FB, etc regarding hot advocacy/education topics.
- More volunteers
- Nothing more than we already have in place
- Within Region, more awareness & effort to apply for advocacy awards which will recognize many active PTA members. Appoint an Advocacy Chair for the Region
- We're able to take care of the needs at the moment. There are times when we have messaged NYS PTA for clarification, but not often.

What NYS PTA advocacy resources does your Region use or share with Units/Councils?

- Advocacy Newsbriefs (10)
- Weekly news (9)
- National (3) and NYS PTA (9) Website (advocacy section)
- VoterVoice (formerly capwiz/engage) (8)
- Virtual Lobby Day Materials (8)
- NYS PTA President's Blog (8)
- Where we stand (1)

➤ **What are barriers to Region Advocacy?**

- Not understanding advocacy process (6)
- Fear of Advocacy(4)
- Lack of volunteers (8)
- Lack of training (6)
- Comments: Tough sell to the units but we continue to work in that area

➤ **What are barriers to local Unit/Council Advocacy?**

- Lack of volunteers (6)
- Not understanding advocacy process (9)
- Lack of training (8)
- Fearful of advocacy (6)
- Comments: Many PTA members still do not recognize that role of PTA or do not want to bother except doing what they've comfortably done for years in their buildings that may not include any advocacy. Not realizing advocacy should be a part of their activities. Information is shared with units and Leg/Ed attendance is encouraged. lack of interest often: don't care beyond their school

- The NYS PTA is currently reviewing the impact of the Legislation/Education Conference. Please tell us how your Region utilizes the resources provided at the conference.
 - The Region was not represented at Leg/Ed (4)
 - We participated in various workshops and share information at region meetings about what was learned.
 - We were very well represented at the Leg/Ed Conference. We bring back many of the materials for use in our Legislation Roundtable packet and to share with our region, units & councils. Many region attendees will also use utilize the information they learned in workshops to share with their unit/council counterparts and with the rest of region board.
 - We in turn share most of the information communicated at our own Leg/Ed breakfast the following Saturday after the State event. We also report on it in our newsletter. The event sometimes helps us identify prospective speakers for our future legislative/advocacy events.
 - We send representative(s), expect sharing of materials by those in attendance
 - Very Inspiring - useful to bring back a report of items discussed to local units and councils.
 - Report to region after event. Pass the materials received during meeting and scan and share with chairs to send to units
 - We send representatives to bring information back to their unit when the unit has paid. We write articles and refer to resources in our Region newsletter (the ECHO) for anyone Region paid to go.

➤ **The Monday after the Legislation//Education Conference is NYS PTA Lobby Day. Regions are able to send one representative paid by NYS PTA expense to join the advocacy team as it meets with key legislators to lobby for current positions important to our members. If you have had a representative attend Lobby Day, please indicate the impact on your Region. If you have not had a representative attend Lobby Day, please indicate barriers to representation.**

- Lobby day is on a weekday and many do not attend because of work obligations (1)
- I do not feel we had any impact as much was not discussed afterwards. (1)
- Non-participatory (1)
- I personally have not attended Lobby Day and would like to this time. In the past our members who attended were thrilled with the experience and shared useful insights from the day.
- No volunteers & lack of time
- We have had a representative attend and they have come back with much detailed information and renewed insight into the legislative process and a better understanding of the direction in which the legislators are leaning on issues of interest & concern to us as a region. We have incorporated this information into our discussions with the legislators at our annual Roundtable and shared it with our units & councils.
- We publicize that we were in attendance so we feel it gives us credibility with our units, we encourage our units to share our region work on behalf of all members
- Legislative Chair reports back to region.
- We have had region representatives and students attend. We have been able to meet with our region legislator for most of those times, gaining his ear to advocate for local regional issues, as well as promoting the State agenda.

Please tell us anything else you as a Region Director would like to say regarding PTA advocacy and the role of the Regions.

- I would just like to see NYS PTA take a stronger stance on various advocacy issues and concerns.
- I would love to see more younger parents give more input of what they feel is advocacy to them.
- I feel we have an advocacy team that covers all the bases and is always gung ho when an issue comes to light that needs to be addressed. I wish we could get more units and councils to be more enthusiastic about advocacy. Unfortunately, the whole Common Core issue has made a lot of PTAs and one issue advocates. Regions have to work harder to get the messages out about so many other important issues. We just have to keep plugging away and working harder to get the messages across.
- I recommend collaborating bringing a number of State level advocacy/legislative events to different regions in a rotating manner to encourage grassroots advocacy.
- We have limited volunteers and advocacy hasn't been our strong point.
- We will continue to reiterate to our units that our mission is rooted in advocacy.
- This is such an important issue!!! We have excellent advocacy at the Council level in Ithaca because of excellent relationships with District administration, Board of Education, etc. Less clear how this extends to outlying regions which have different demographics but similar needs.
- Units simply don't understand advocacy and how to use it effectively.
- This is a topic we would like explored at our Spring Conference
- We might benefit from a graduated training package on advocacy that can be used in Schools of Instruction (say starting with advocacy in the unit's school to help them get comfortable, then graduate to regional, state, etc. types of advocacy). If members lost their fear of the unknown, we might get greater interest in the larger advocacy efforts.

SWOT Analysis for Advocacy Planning

- **1. Determine who should be involved with developing the plan.**
 - **Exec committee**
 - **Board members**

SWOT Analysis for Advocacy Planning

- 1. Determine who should be involved with developing the plan.
 - Exec committee
 - Board members
- **2. Analysis of current advocacy capabilities**
 - **SWOT Analysis**

SWOT Analysis for Advocacy Planning

➤ Strengths and Weaknesses

- What are your main achievements over the last two years?
- How successful have you been in achieving your policy goals?
- How effective are your relationships with other key stakeholders in the state?
- Do you have the volunteer levels and expertise needed to meet your objectives?
- Are you able to build effective relationships with those you wish to influence?
- Are you effective at communicating advocacy goals and updates to your membership?
- How effective is your infrastructure?
- Does the leadership have the expertise needed to lead the advocacy work?
- What are your grassroots capabilities? Have you considered how to use your volunteer base in advocacy efforts?

SWOT Analysis for Advocacy Planning

➤ Opportunities and Threats

- How is your Region regarded externally? Are stakeholders familiar with you?
- Are other allied groups considering a legislative push that you could join? If not, would they be supportive of your advocacy goals?
- Who will oppose your agenda? Who will support it?
- Are there legislators who are friendly toward PTA positions that you should approach?

SWOT Analysis for Advocacy Planning

- 1. Determine who should be involved with developing the plan.
 - Exec committee
 - Board members
- 2. Analysis of current advocacy capabilities
 - SWOT Analysis
- **3. Create a vision and plan**

Ways to Advocate

- There are many ways to be an advocate! Some ways families can be involved are to:
 - Meet with school leaders to discuss a topic of importance to the district.
 - Attend a school board meeting and/or serve on the school board.
 - Work with the school and state leaders to implement strong family engagement policies.

National PTA: <http://pta.cms-plus.com/files/2014%20Advocacy%20Brochure.pdf>

Ways to Advocate

- Sign up for the NYS PTA VoterVoice and National PTA Takes Action Network to get updates on important state and federal policies and send messages to your legislators.
- Write a letter to the editor to stress the importance of family engagement and other PTA policy priorities.
- Educate your legislative representatives and their staff on PTA's state and federal public policy priorities.

National PTA: <http://pta.cms-plus.com/files/2014%20Advocacy%20Brochure.pdf>



PTA Strategy Chart

Advocacy is the cornerstone of PTA's mission. In order to achieve your advocacy goals at any level, it is important to have a strategic plan. This chart poses the right questions in the right order and serves as a particularly useful tool for group discussions, as it maintains focus to the issue at hand. Use this chart as a guide to developing your strategy and revisit it to check your progress.

GOALS <i>The victory you want to achieve.</i>	ORGANIZATIONAL CONSIDERATIONS <i>What you have to put into the fight (time, money, etc.), and what you want to get out of it organizationally (how will others perceive you/the PTA).</i>	CONSTITUENTS, ALLIES, OPPONENTS <i>Who else cares about this problem enough to join in doing something about it? Who will not agree with you on this issue? Who does it impact?</i>	TARGETS <i>Those who can give you what you want. Always a person.</i>	TACTICS <i>The things that you and your constituents and allies must do to get the decision-maker(s) to make the decisions that will allow you to achieve your goal.</i>

Legislative/Advocacy Calendar

September/October/November

- Determine key issues, committee, and budget requirements for the year
- Study all PTA legislative publications
- Present Basic Policy and proposed Convention Resolutions at a unit, council or region meeting. Keep record of vote on convention resolutions
 - http://nyspta.org/pdf/Advocacy/Basic_Policy.pdf
 - http://nyspta.org/Advocacy/advocacy_resolutions.cfm
- Attend PTA Region Fall Conference
- Attend NYS PTA Convention (November 11-13: Saratoga Springs)
- Inform your members and community about actions taken at Convention
- Advocate for a position statement or resolution



Legislative/Advocacy Calendar

January

- (*Note - Legislature convenes the first Wednesday after the first Monday)
 - <http://assembly.state.ny.us/>
 - <http://www.nysenate.gov/>
- Meet with legislators about issues of concern. Get copies of any bills that are of interest to your unit
 - <http://open.nysenate.gov/legislation/>
 - <http://assembly.state.ny.us/leg/>
- Begin work if planning on submitting a resolution
 - http://nyspta.org/Advocacy/advocacy_resolutions.cfm
- Contact your school administrators concerning the effects of the Governor's budget and state aid proposals
 - <http://www.budget.ny.gov/>



Legislative/Advocacy Calendar

February

- Read Advocacy Communications (Advocacy News briefs, PTA Takes Action, Action Alerts, etc.) Contact legislators, urging action as suggested.
 - http://nyspta.org/Advocacy/advocacy_home.cfm
- Inform members on proposals and bills that are important to PTA



Legislative/Advocacy Calendar

March

- PTA Key Advocacy Partner Training: TBD
- PTA Lobby Day: TBD
- Virtual Lobby Day: TBD
- National PTA Legislative Conference – March 7-9
- Send letters, e-mails & phone calls to legislators and the media on issues important to your PTA
- Visit legislators in their home offices
- Keep everyone informed! Share all information!



Legislative/Advocacy Calendar

April

- Respond to Legislative and Advocacy Alerts
- Make plans to attend the Nassau Region PTA Spring Conference
- Cooperate with other chairs and school personnel to educate members on school budget/school board elections
- Submit resolution to NYS PTA office : deadline, April 15th



Legislative/Advocacy Calendar

May - June

- Attend Region PTA Spring Conference
- Be prepared for action -- last minute rush at end of state legislative session! (3rd week in June)
- Attend National PTA Convention – June 22-25
- Review and report legislation activities for the year; assess your progress; identify ongoing concerns.



SWOT Analysis for Advocacy Planning

- 1. Determine who should be involved with developing the plan.
 - Exec committee
 - Board members
- 2. Analysis of current advocacy capabilities
 - SWOT Analysis
- 3. Create a vision and plan
- **4. Review and update plan annually**

Check State and National Positions

NYS PTA (www.nyspta.org)

- Basic Policy http://nyspta.org/pdf/Advocacy/Basic_Policy.pdf
- Where We Stand (resolutions, position papers)
<http://www.nyspta.org/pdf/Advocacy/WHERE-WE-STAND-2016.pdf>
- Legislative Priorities
<http://www.nyspta.org/pdf/Advocacy/Legislative-Priorities-2015-2016.pdf>

National PTA (www.pta.org)

<http://www.pta.org/advocacy/?navItemNumber=505>

- Legislative Program (directives, resolutions, position statements)
- Public Policy Agenda

