



Effective advocacy for school leaders

Nine steps to effectively advocate for public education



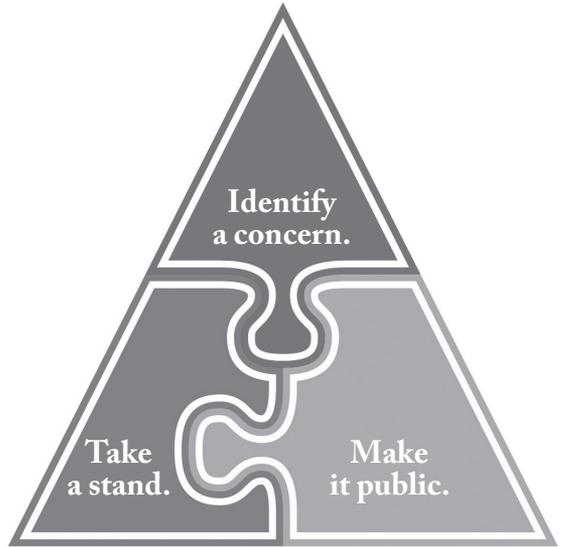
**Ohio School
Boards Association**

Introduction

The definition of advocacy is “the act or process of advocating or supporting a cause or proposal.”

This definition has three elements:

- It identifies a particular cause or policy that concerns the public.
- You take a stand for or against something about which you are knowledgeable.
- It’s public — you have to let others know what you believe or recommend.



Your authority to advocate — whom do you speak for?

As an individual

Your right to speak, write or petition on public policy issues is protected by the First Amendment. You have the right to speak as a citizen and, if a school board member, as an elected official — on your behalf. You can express your own views on a cause or policy and how it will affect your district, but you cannot do so as an individual — even as an individual board member — on behalf of the school board unless the board had taken an official position or you are authorized to do so.

As a representative of others

You can advocate as a representative of your school board, district or other organization only if you are designated, employed or otherwise empowered to do so. Unless you are authorized to support or oppose a particular cause or policy, you must represent the position of the group, not just your own opinion.

You may be both an individual and a representative, but keep your different roles distinct. It is important to always identify whether you are advocating as an individual or representing an organization.

Advocacy for public education

As an advocate for public education, you provide support for or against public policies that have an impact on the district’s students, parents, staff

and stakeholders that are decided by other public bodies (the Ohio General Assembly, State Board of Education, governor, U.S. government and other local governments).

Issues concerning your district that are decided or influenced by others

Students and learning

The education of Ohio's public school students is OSBA's top priority. Every child can learn, and every child will learn if the conditions are right. The key component to establishing the right educational environment is the relationship among students, parents, the school district and the community. Each needs to be accountable for sharing in the process.

OSBA believes that all students must have equal access to a high-quality education that prepares them for higher education or career entry. Every student must be provided with challenging instructional programs presented by competent and caring teachers in a safe and supportive setting.

School governance

The cornerstone of public education in Ohio is locally elected boards of education that exercise local control in establishing policy and governance of their public schools while remaining accountable to the citizens who elected them. Local control includes control over financial matters, curricula and educational programs, personnel, school calendars and educational priorities based on the unique needs of local communities.

School funding

Stable and adequate funding is essential to a sound educational system. OSBA supports creating and establishing an adequate and equitable funding system for Ohio public schools. The association believes that this is a constitutional responsibility of the General Assembly, with oversight from the courts. The association pledges to work with the governor and members of the General Assembly to create such a funding system.

Personnel

The effective recruitment and retention of high-quality staff are critical for the success of any school district. Properly trained and highly motivated personnel can provide maximum learning opportunities for students. Ongoing evaluation of staff performance is essential.

Nine steps to effectively advocate for public education

1 Know the issues

2 Know your district

3 Know where you stand

4 Know the decision makers

5 Know how to contact decision makers

6 Know the calendar for decision making

7 Know how to state your case

8 Know how to reach the public

9 Know your role in the electoral process

Step 1

Know the issues

Goal: You and your school board will know and understand local, state and national issues concerning school districts.

Make sure you are receiving the information you need to make decisions.

- Receive and read OSBA email updates and alerts. Attend seminars, meetings and webinars offered by OSBA.
- Read supplemental OSBA materials and information from other organizations, news services and the media you use and trust.
- Sign up to receive communications from elected officials. Listen to their messages and provide information and reaction to support or challenge what they say.

Make advocacy issues a regular and expected part of school board activities.

- Each board of education should designate a member as a legislative liaison to take the lead in board advocacy activity.
- Sign up for “Facts in a Flash,” OSBA’s weekly e-newsletter that covers activity at the Ohio Statehouse. Locate and bookmark the BillTracker page on the OSBA website.
- Include a regular item on your board meeting agenda to review current state and federal issues and discuss their impact on the district and the board’s response.
- District administration should receive information from state agencies such as the Ohio Department of Education (ODE) and should prepare regular reports to the board and community.
- Respond to OSBA calls to action and requests for information.

Create opportunities for public input.

- Encourage formal and informal public input, public comments at board meetings, hearings and community listening events at schools and other locations in your district.
- Provide structured opportunities for the public to listen and speak on key issues. This could include holding public forums on specific public and legislative issues concerning your district.

Step 2

Know your district

Goal: You will have a clear understanding of the impact of state and federal action on your district based on the characteristics of your students, families, economic interests and region.

Working with district staff, prepare a report on the key facts about your district, compared to state and regional averages, including:

- current enrollment, trends and projections;
- characteristics of students and the impact on special needs and program costs, including special education, low income or at-risk, limited English proficient, vocational/career and technical education, transportation costs and turnover;
- student achievement measures: state and local assessments, graduation rates, college and career preparation;
- curricular and extracurricular programs offered by the district, and special programs and services (preschools, virtual schools, alternative schools and others);
- joint programs and services provided with other districts, local government, higher education, the military and others;
- budget trends: total and per-pupil spending, major categories of revenue and expenditures, state aid versus local revenues under current formulas, federal funding;
- employees, salaries and benefits, teacher contracts;
- budget allocations: district spending on major budget categories (instruction, student and teacher support, administration, operations and maintenance, transportation, food service, capital expenditures and debt service, cash balances and reserves);
- potential changes in district structure: change in number or use of existing buildings; district consolidation or cooperative agreements with other districts;
- economic trends in your district: population change, employment, major employers, impact of schools.

Share this information with legislators, district staff and community advocates, and make it available to the public. OSBA and ODE can provide much of this information.

Step 3

Know where you stand

Goal: You and your district will develop specific recommendations and/or official positions on issues that will be decided by others at the local, state and federal levels.

Have a process to adopt positions on major issues and policies.

- Adopt positions on major policy questions as a board, including action by the Ohio General Assembly, State Board of Education, Congress or state and federal agencies.
- Provide input to the OSBA legislative division, review proposals for OSBA's Delegate Assembly and instruct your delegate how to represent your board.
- Adopt a district legislative priority list prior to the Ohio General Assembly session beginning in January. Include OSBA positions, if possible.
- Determine whether to designate authorized representatives of the board on policy positions (superintendent, other staff or district lobbyist, board president, governmental relations designee).

Communicate those positions internally and externally.

- Brief your teachers and other district groups on legislative issues, including your district's legislative goals.
- Invite key leaders of your community — business, local government, service clubs, churches — to a meeting on how your schools are responding to national and state requirements, as well as local needs and values. Discuss how proposed legislative issues will affect your schools and community.
- Host a districtwide meeting of parent organizations and booster clubs to review the impact of legislative issues on public education generally, and your schools in particular.
- Consider joint meetings with other districts or organizations with similar goals (other education groups, local government, businesses, child and family services) to review district positions, learn about other interests and seek common goals and strategies.

Step 4

Know the decision makers

Goal: You will know and have a relationship with elected officials representing you as an individual voter and your district and community as a whole.

Build personal relations with your elected representatives.

- Introduce yourself to your elected representatives by phone, email or letter and request a personal meeting. Present yourself as concerned constituent, fellow elected official and information source on education.
- Attend events called by elected officials, including meetings, coffees and campaign stops.

Build relationships between your district and elected representatives.

- Set up meetings with your legislators and superintendent, board president or legislative network members.
- Invite your legislators to discuss issues at a regular or special board meeting. Discuss issues from the OSBA Legislative Platform or other issues determined by your board.
- Ask legislators to visit your schools. Show them special programs, meet with staff and review student achievement data and share information about issues facing students and schools in your community.

Build relationships with other leaders.

- Host or participate in a joint meeting of several boards in your county or area prior to the legislative session.
- Identify and collaborate with local leaders who understand and value public education and are willing to communicate with elected officials and opinion leaders.

Resources

Information on legislators, including contact information, biographic data and legislative districts, is available on the Ohio General Assembly website:

www.legislature.state.oh.us.

Contact OSBA for additional information.

Step 5

Know how to contact decision makers

Goal: You will be able to quickly and effectively communicate your information and recommendations to key decision makers.

Plan for ongoing communications.

- Make sure you have phone numbers, addresses and email addresses for your state senators and representatives, State Board members and members of Congress.
- Ask your elected officials how they prefer to be contacted: by phone, mail or email, and ask the best way to reach them for urgent information before voting.
- Provide your phone, cell phone and email address; sign up for email newsletters; and encourage them to contact you, especially before voting on key education issues.

Determine the best way to contact your elected representatives.

- Phone calls or texts are the fastest means of contact, but you may not get through when officials are in session. Ask for their cell phone number.
- Letters provide written documentation of your positions and facts as a reference, but mailing is the slowest communication.
- Email is fast and provides a record, but may not be opened in time or at all.
- The best solution is a mix of all three.

Contact after action or vote.

- When elected officials vote as you want, thank them personally and publicly.
- When officials do not vote as you want, politely express disappointment and urge reconsideration if the issue comes back.

For all forms of communication.

- First, state your position (what you want them to do).
- Second, support your position (why you want them to do it and why they should support it).
- Third, offer to provide more information or alternatives, if any.
- Finally, thank them for listening and encourage further communication.

Step 6

Know the calendar for decision making

Goal: You will understand the key steps in the political process to communicate with decision makers on a timely, useful basis.

By law, the General Assembly begins in January in each odd-numbered year and ends in December of each even-numbered year. Members are elected in even-numbered years. Senators are elected to four-year terms and are limited by law to two consecutive terms. House of Representative terms last two years with a limit of four consecutive terms. The governor is prohibited by law from serving more than two consecutive four-year terms.

In odd-numbered years between Jan. 1 and June 30, committee chairmanships are announced. General committee assignments are made in January. The governor introduces the executive budget (suggested spending and tax levels for the next two fiscal years) in January. The final budget must be passed by the General Assembly by June 30. Much of the session's legislative activity occurs during this period and at the beginning of the second calendar year of the session. Between July 1 and mid-December some voting session days and committee activity are conducted.

In even-numbered years between January and mid-May, the House and Senate are in session. This time usually involves consideration of the budget correction bill (or mid-biennial budget review) and capital construction bills. In addition, candidates for House and Senate seats must file nominating petitions with boards of elections 75 days before the May primary. Between mid-May and November, the legislature typically is in recess for campaigning. The time between November's general election and the end of December in even-numbered years is called the "lame duck" session. This is often when politically sensitive issues are dealt with.

Step 7

Know how to state your case

Goal: You can effectively present the reasons for your position or recommendations in formal and informal settings.

Testimony.

- Most elected officials want to hear more from constituents and “regular citizens.” Speak on behalf of your constituents rather than a “special interest.”
- Discuss how the issue will affect your district as you see it; don’t worry about being an expert.
- If you want to provide testimony at legislative hearings, contact the committee chair’s assistant or secretary for the time, room and rules. Contact OSBA’s legislative division for assistance.
- Testimony in Congress generally is by invitation only.

Office meetings in Columbus and Washington, D.C.

- Meet with your representatives when visiting as a private citizen or as part of organized activities. OSBA holds an annual State Legislative Conference (usually in March). OSBA also appoints members to the National School Boards Association’s Federal Relations Network.
- During session, legislators are extremely busy; appointments may be brief. Congress is worse; you typically only meet with staff.
- Have an agenda to discuss and keep the conversation on your district issues.
- Bring written materials to leave with them.

Meetings in your district or community.

- In meetings with legislators or members of Congress prior to the session, schedule time to present your issues and the impact of proposed legislation on your district. Allow legislators to discuss their own priorities, but make sure to question them on their views on school district concerns.

Other public events: listening tours, forums, town hall meetings.

- OSBA can help with scheduling, format, background information and other issues.

Step 8

Know how to reach the public

Goal: You can provide the public, both voters in general and key opinion leaders, with information that encourages them to support your positions.

Use school district communications to inform the public.

- Place a discussion of legislative issues or communication with legislators on each board meeting's agenda so the press can report it. This also will increase awareness if your district meetings are televised.
- Include information on key issues in district publications or special mailings to stakeholders. You do not need to lobby in these publications — just present the facts and the school board's position.

Use public and personal communications to share the message.

- Ask to write a guest column or send a letter to the editor to local newspapers.
- Offer to appear and participate in public affairs radio/TV programs or call-in shows, or contribute to blogs on issues concerning the district and its positions.
- Volunteer to have the superintendent, board president or legislative liaison speak to community organizations. OSBA can help presenters prepare.
- Prepare media releases and provide interviews with news outlets. You can use information from OSBA media releases or member alerts to supplement your own materials, or take them directly to the media in your community and ask that they be printed or used.
- OSBA can provide information and talking points, or come to your community to present on local issues.

Organize a group for district advocacy action.

- Set up regular meetings and activities for school leaders and community members who want to support public education in your community and statewide. Include representatives of teacher or parent organizations and area administrators, plus other supportive parents and stakeholders.
- Create a school district advocacy team or network of interested parents and stakeholders to communicate concerns about state and federal policy issues.

Step 9

Know your role in the electoral process

Goal: You can effectively and appropriately participate in the election process which determines the decision makers.

Understand the boundaries of political activity.

- School district resources may not be used to promote or oppose political candidates or issues submitted to the voters. Your activities must be undertaken as an individual citizen. You may communicate your support for candidates or issues as an individual and inform voters on issues, but cannot directly tell stakeholders how to vote using public resources.

Actively participate in the electoral process as an individual.

- Inform yourself on candidates' positions and voting records.
- Remember that money, time and public support are vital to any campaign. Provide assistance to candidates you support through campaign contributions, yard signs and other volunteer activities, like door-to-door campaigning. Contact the candidate or campaign staff to learn how to help.
- Recruit candidates supporting your positions for office or consider running yourself. School leaders bring valuable perspectives on public education to state and federal offices.

Have your district sponsor nonpartisan election activities to promote informed voting.

- Work with your county board of elections to promote voter registration materials in your schools and at school events.
- Use district publications and other communications to remind staff, parents and stakeholders of deadlines for voter registration, early voting and voting the day of the election.
- Host debates or candidate forums in schools that focus on education issues. OSBA offers a candidates night tool kit.
- Have booster clubs, political science classes, district or student publications or district advocacy organizations submit questions to candidates and post responses in voter guides prior to the election.
- Encourage individual stakeholders to get involved in local campaigns for candidates supporting their interests in public education.



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OSBA leads the way to educational excellence by serving Ohio's public school board members and the diverse districts they represent through superior service, unwavering advocacy and creative solutions.