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## Guidelines for Advocating

The third Purpose of the PTA is “To secure adequate laws for the care and protection of children and youth.” Since its inception in 1897, PTA has been instrumental in enacting laws and regulations that pertain to the health, education and welfare of children and youth. Decisions surrounding these issues are made by lawmakers at the city, state and national level and by policy-makers such as local school boards, the state board of education, and the federal department of education. Decisions made in the judicial system can also have an affect on laws and policies. It is important for PTA members to understand the rules regarding non-profit organizations when acting or speaking on behalf of children.

### Is lobbying legal? Yes!

Nonprofit organizations, such as PTA, are governed by specific rules under IRS regulation 501(c)3 regarding advocacy work. PTAs are nonpartisan – that means we may NOT support or oppose any candidate or party. PTA members may engage in legislative activities on behalf of children and youth and may educate the general public and policy-makers about PTA issues affecting children. PTA is allowed to attempt to influence legislation through lobbying efforts, but PTAs may not devote more than an insubstantial part of their activities to influence legislation (generally interpreted as not exceeding 5 percent of gross income). Refer to the *PTA Money Matters Quick-Reference Guide* for more information about lobbying. *PTA Quick-Reference Guides* are mailed to the PTA President every year. They are also available on the National PTA website at: [http://www.pta.org/reference\\_guides.asp](http://www.pta.org/reference_guides.asp)

The Username and Password on your PTA membership card are required to access the *PTA Quick-Reference Guides* online.

### Contributing to Political Action Committees

The PTA may NOT contribute to a political action committee (PAC) whose whole purpose is to influence the election of any individual to public office. PTA may support a PAC that takes a position on a ballot issue (such as for a zoning or constitutional matter, school levy, or statewide referendum). However, the PTA must be absolutely certain that the PAC it supports is strictly issue-oriented and does not support or oppose any candidate or party.

### Ballot Issues

PTAs are often involved in campaign committees dealing with ballot issues such as one to promote a local Instructional Support Levy or a Local Option Tax. Since taxpayer dollars are used to purchase school supplies and to pay the salaries of school employees, any use of school resources or of school employee time could result in an ethics charge being filed against the school system or a school employee. PTAs are private organizations, and as such are not so restricted. However, PTAs must take all necessary precautions to ensure their actions do not inadvertently cause problems for the school system or a school employee. To avoid violations, PTAs should follow these guidelines:

- Maintain a mailing list of PTA members, and mail campaign materials (including newsletters if they contain promotional material) directly to PTA members. Do not use a school-supplied mailing list. Do not send campaign material home with students.
- Copy all campaign material *off* school premises. Do not use school copiers.
- If the PTA website is sponsored by the school, then do not put campaign materials on the website. If the PTA website is independent of the school, then campaign materials may be put on the website. It is okay for the school’s website to link to the PTA website.
- Distribute campaign material during PTA meetings. If the school system has a policy allowing private organizations to use the buildings, the PTA meeting is a private meeting and distribution of materials does not violate the law.
- Distribution of educational material (non-promotional) using school resources is NOT a violation of the law. For example, you can send home a flyer with students urging parents to vote in the upcoming referendum; however, you may not urge them to vote “YES” unless you mail the flyer using the PTA’s distribution list.
- Discuss campaign plans with the principal in advance to ensure mutual understanding of the law.

## **Conducting Candidates' Forums or Legislative Forums**

PTAs may conduct candidates' forums or legislative forums alone or as part of a coalition with other nonpartisan groups. *Candidates' forums* are held before an election to give concerned parents and other voters an opportunity to become better informed about the candidates for local or state elected office. *Legislative forums* are held during the legislative session to inform citizens about the issues. *Legislative forums* can also provide an opportunity for citizens to communicate their concerns to the lawmakers. Possible formats include speeches, panel discussion, and an audience question and answer session. Whatever the format, each candidate or legislator must have an equal and fair opportunity to express his or her position on issues.

Guidelines to follow when conducting forums are:

- Select a location that will hold a crowd and be accessible to anyone with physical disabilities.
- Invite the candidates/legislators. Be sure to invite EVERYONE from your area. Inviting all candidates or legislators helps avoid the appearance of partisanship or discrimination and gives the community the opportunity to hear from everyone. If you are conducting a legislative forum and there will be many more legislators from one party attending than from another party, Iowa PTA recommends that the forum be canceled or postponed to avoid giving the appearance of partisanship. If you are conducting a candidates' forum, there must be at least two opposing candidates. If only one candidate will be appearing, cancel the forum.
- Do NOT offer to pay for a candidate's or legislator's expenses to attend the forum or for the cost of producing or distributing their information.
- Choose a moderator who can treat all candidates/legislators fairly and is not publicly allied with anyone. The moderator should not make any comments or imply anything against or in favor of any candidate.
- When promoting the forum, avoid targeting voters likely to support or oppose a certain candidate of legislator. Encourage the whole community to attend. See the "Marketing and Public Relations Planner" in the *Annual Resources for PTAs\** for suggestions on how to publicize the event.
- Establish ground rules for the distribution of campaign materials by candidates, and do not allow PTA members acting in an official capacity to hand out the materials.
- Review the format with the candidates before you begin. Introduce them to the moderator and review time limits and other ground rules you may have established.
- At the opening of the forum, have the moderator explain the format, time limits, and ground rules to the audience.
- PTA board members and event organizers should not wear campaign buttons or otherwise endorse a candidate at the event.
- Do NOT declare a "winner."
- Do NOT urge members of your PTA to support or oppose any candidate. PTA members, as individuals, have a right to support candidates for public office. However, they should NEVER use their PTA position or title when supporting any candidate or when appearing at a PTA event.

## **PTA Leaders Seeking and Holding Public Office**

There are several considerations PTAs need to keep in mind when a PTA leader contemplates holding public office. *PTA leader*, for purpose of this information piece, shall be considered the president, legislative chair, and any other officer and board member who speaks regularly on behalf of the PTA. The PTA leader should not use his or her position as a speaking platform, and PTA letterhead or email should never be used to distribute campaign information. There should be serious consideration given to possible conflicts of interest if the PTA official becomes a public official.

## **Advocacy for Children and Youth**

What you do to improve laws, policies, and conditions on behalf of children is advocacy, whether in your community or at the state and federal levels. PTA defines *advocacy* as the act of mobilizing individuals and local PTAs to work with the state and National PTAs to spark changes in programs and policies that benefit children. An effective advocacy campaign is built on activities and events that keep the PTA issue visible and motivate people to act.

**For more information about PTA legislative activities, go to the Legislative section of the National PTA website at [www.pta.org](http://www.pta.org)**