



OPPORTUNITY & ACTION FOR
EVERY STUDENT
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Advocating for Great Public Schools



Advocating for Great Public Schools

Educators know what their students need to succeed. This handbook provides guidance to help you and your Association harness educators' collective power to promote and secure student-centered, educator-driven policies and collaborative structures.

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Introduction

Educators have the privilege of inspiring students' curiosity, imagination, and desire to learn. To ensure that all students are taught by caring, committed, and qualified educators, and have equitable access to the programs and resources they need to succeed, educators must also be at the table advocating and bargaining for the policies, structures, and funding that ensure those needs are met.

The term “advocacy” may feel unfamiliar, and possibly intimidating to many educators. Advocates do more than lobby Congress or visit the state legislature. Sometimes the most effective advocacy happens in classrooms, at bus barns, in staff meetings, and in meetings with administrators and with local school board members. You have probably been speaking out for years on behalf of your students—without calling it advocacy. This handbook is designed to help you and your colleagues take that passion for great public schools and channel it into effective collective action to create the schools your students deserve.

We recognize that every school and every community is different. NEA developed an Opportunity Checklist and an Opportunity Audit to help educators, families, students, and community stakeholders evaluate their individual schools to determine the school's strengths and challenges. If you have not already conducted these opportunity assessments, we recommend you start there. The data you collect will inform local planning, and conducting the exercises can help you engage additional members and the community in the school improvement process.

Once you have determined your school's strengths and challenges, you can assemble a team, engage the community, identify how you would like to highlight any strengths and address the challenges and plan your course of action. NEA is proud to offer this handbook to guide you through that process. It contains exercises to help you develop your leadership skills, and templates to help plan, monitor, and evaluate your collective actions.

NEA supports your efforts to provide your students the schools they deserve. We know you will do great things, and are eager to hear about your successes, and how engaging in collective action impacts you as a leader.

Please share your stories in NEA EdCommunities. This online professional learning community connects educators, school support professionals, and community members across the country who are committed to improve student success. There you can learn from others across the country who are working like you to ensure a great public school for every student. If you are not already a member, you can join here: www.mynea360.org/NEA_GPS_RegistrationPage#/registration.

See also NEA's Collective Bargaining and Membership Advocacy's student-centered advocacy toolkit, “The Road to Student Success” for additional information on student-centered advocacy and bargaining strategies. The guide can be found at www.nea.org/assets/docs/The_Road_To_Student_Success.pdf.



Inside every great public school are leaders.

Today's educators have a tremendous opportunity to place themselves squarely in the center of the effort to make sure that every student in America attends a great public school. To take advantage of these opportunities, educators will need to equip themselves with the knowledge, skills, and abilities to lead. As you use this handbook to transform your workplaces and communities, you'll also develop your leadership skills. NEA has defined what it means to be a leader through the development of a series of six leadership competency domains: The NEA Leadership Competency Framework.



As you develop and implement your advocacy plan, we encourage you to also track your leadership growth. Begin by reviewing the competency framework and completing self-assessments, both of which can be found at www.nea.org/leadershipdevelopment.

As you complete each of the exercises, reflect on the skills you are learning. In many cases the skills span multiple competencies, providing opportunities to increase your leadership proficiency while achieving wins for your students and transforming your profession and communities. Throughout this handbook, as you complete each exercise, visual reminders serve as signposts to remind you of the competencies, progression levels, and behaviors you need to lead in your profession and create a relevant, thriving Association.

Phase One: Prepare

TAB FPO

TAB Back FPO

Phase One: Prepare

In this phase, you will engage your members and partners in the community as you build your support base, clarify your vision of what you would like to accomplish, and begin to engage the public. This is also when you develop primary and secondary goals, and determine how you will identify success, so you can take baseline measurements of those metrics. The elements of this phase are represented graphically below. These elements should be approached simultaneously as you develop your plan. While you should complete Phase One before proceeding to Phase Two, you will find yourself returning to the components of Phases One and Two throughout your campaign, as you incorporate what you learn throughout the process.



If you are reading this handbook, you have likely come to some conclusions about yourself as a leader. You understand that educators must advocate for policies and strategies that positively impact our professions and student learning. Congratulations, that's a crucial skill for Leading Our Professions!

www.nea.org/assets/docs/Curriculum%20Outline%20Leading%20Our%20Professions.pdf

Engage Members: Build Your Team

Membership involvement is crucial to successful advocacy efforts. Members and prospective members are more likely to get involved when we listen and work collaboratively to identify issues that resonate locally. Scheduling meetings to engage in these conversations is critical. To maximize turnout, promote your visit through traditional and digital communications. Consult building representatives to learn as much as you can in advance about the school and its staff.

Listen. Ask questions to learn what members and prospective members value, and what inspires them. Determine who is most likely to support and participate in advocacy to address the needs of their students, and find out what other groups and organizations they belong to that might also be interested in participating. Explore opportunities to share information with those other organizations.

Share. The more you know about each other, the deeper the relationship will be. Include reports on the issue and the advocacy effort in Association communications, including publications that target education support professionals, retirees, Aspiring Educators, leaders, early career educators, and building representatives. Utilize traditional and social media to reach your members and provide tools to enable them to contact the media or reach decision-makers. Include links to the campaign website for additional information. Provide flyers for Association bulletin boards and always be sure to include a contact for additional information.

Agitate. Move your colleagues to action by familiarizing them with the issues. Conduct workshops and otherwise promote how the advocacy plan will help improve the teaching and learning conditions in their classrooms, and how they can get involved. Offer opportunities to practice and role-play with their peers to increase confidence. Consider using smartphone apps that allow you to disseminate information quickly, and call your members to action.

Nurture local leaders. Identify, support and guide members who are interested in taking the lead, and provide them with additional information and learning opportunities so they can do so effectively.

Continuously recruit. Include rallies and petition drives, phone banks and building canvassing in your plan (see Phase Two). These events generate enthusiasm for the campaign (and the Association), and can expand your pool of volunteers.

Commit. Conclude every conversation with a mutual commitment. Identify a specific role or action that aligns with the shared values you have identified. This may be as simple as providing contact information so you can stay in touch. Provide all the information needed to fulfill the request, and make a commitment to follow-up. By making mutual commitments, you demonstrate a team approach and your continuing support.

Engage Members: Exercise

Using the guide provided below, practice a one-on-one conversation with a colleague. Find out how your partner entered the profession, what she or he finds most satisfying, most frustrating, and what action(s) he or she would like to see the Association take. Use the template below to capture essential information.

Steps	Explanation	Best Practices
Introduction	Follow the 80/20 rule: listen 80% of the time and speak 20%. You are there to learn their concerns, and to give individuals a chance to share what motivates them.	Be friendly, confident, enthusiastic and helpful. No matter what, keep your cool.
Exploration	Ask probing questions. Understanding their story, values, and resources helps identify a shared purpose.	Ask follow-up questions to learn about experiences that influence their perspective, relationships with colleagues and building leaders, lives outside work, and professional aspirations.
Exchange	<p>Educate: Share factual information about issues affecting the profession and actions the Association is taking to address those issues.</p> <p>Agitate: Discuss why these issues are important and who is making decisions that affect educators and their students.</p> <p>Ask: solicit ideas on how to solve problems facing educators and their students.</p>	Ask who else in the building you should speak with to learn who is known and trusted.
Commitment	Describe what your Association hopes to accomplish, and your plan to achieve that goal. Outline specific actions scheduled as part of the plan, and invite participation. Make a commitment to follow up.	Be specific. Make sure you are clear on the request and explain how the action will help achieve a common goal that aligns with shared values.
Reflect	Evaluate the conversation. What did you learn? Did you get a commitment? What would you do differently?	Consider roles that would be appropriate for the people you meet. On a scale of 1-4, how engaged were they? What are your next steps?



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Name: _____ Personl Email: _____
Cell Phone: _____ Text messages OK? Yes No School/Worksite (if applicable): _____
Address: _____ Are you an NEA member? Yes No
_____ Are you an Early Career Educator (5 years or fewer)? Yes No

Which issues are you interested in? (Check all that apply)

- | | | |
|----------------------------------------------------|-----------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Standardized Testing | <input type="checkbox"/> Educator Empowerment | <input type="checkbox"/> Community Schools |
| <input type="checkbox"/> English Language Learners | <input type="checkbox"/> Institutional Racism | <input type="checkbox"/> School Discipline |
| <input type="checkbox"/> Resource Equity | <input type="checkbox"/> Teacher Evaluations | <input type="checkbox"/> Other _____ |

What actions are you willing to take? (Check all that apply)

- | | | |
|------------------------------------------------------------|--------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Complete a Survey | <input type="checkbox"/> Attend a School Board Meeting | <input type="checkbox"/> Attend Briefing/Community Forum |
| <input type="checkbox"/> Serve on an Educator Action Team | <input type="checkbox"/> Meet with Decision Makers | <input type="checkbox"/> Help with Social Media |
| <input type="checkbox"/> Write a Letter to Decision Makers | <input type="checkbox"/> Other _____ | |

To what community organizations do you belong? _____

In which of these organizations are you most active? _____

In what languages are you fluent? _____

How would you like to see your Association become more active in the community? _____



Governance and Leadership: Engaging educators and those who share your values requires the skill to establish and maintain collaborative and effective relationships. Moving through this exercise helps build your proficiency in Governance and Leadership.

www.nea.org/assets/docs/Curriculum%20Outline%20Governance%20and%20Leadership.pdf

Engage the Community: Build a Coalition

A coalition is a group of allies that share a common interest in achieving a specific goal, and have agreed to work together to do so. A coalition that represents a broad cross-section of the community will be more powerful, so think creatively when considering who to invite to join. Do not rule out groups simply because they previously were on the opposite side on a different issue; there are no permanent allies or adversaries.

Before approaching a potential ally, learn what issues are important to them, and if they have taken a position on your issue. Be prepared to provide solid information on the issue and your proposed solution, as well as your advocacy plan. Do not assume others are aware of all the implications of the issue.

Once your coalition is formed, adopt processes that solicit opinions and feedback from all coalition members, and strive for consensus decisions. Some activities will be true coalition activities, sponsored and organized by the coalition; other activities can be coordinated through the coalition, but implemented by only some of the coalition member organizations--just be sure all coalition members know about all activities.

While the broader membership of the coalition should reflect the diversity of groups that share the campaign's goal, your spokesperson should generally represent a neutral mainstream organization. Depending on the nature of your goal, however, the spokesperson may need to represent the specific population that will be served.

Communication. Your coalition can develop materials for distribution to their respective members, the media, the public, and policy-makers. Such coalition-branded communications demonstrate the breadth of support for our issue. Coalitions can expand the distribution network for disseminating materials created by your Association, either directly, or as adapted for their individual use. The communication strategy should be developed by consensus, and should include such earned media events as open forums and panel discussions designed to reach key audiences. Coalition members should attend to ask questions and help ensure a friendly audience.

Briefings and meetings with policymakers should include representatives who demonstrate the diversity of the coalition. Coalition materials should include a membership list that also documents the breadth of support.

Build a Coalition: Exercise

Membership in your coalition will depend on the nature of your issue. Consider whom your issue impacts, and what other groups share an affinity for the impacted population. A list of potential allies is provided below.

For this exercise, working as a group, identify your current partners and allies, and then brainstorm what organizations should be, but are not already part of your coalition.

Current Partners	Point of Contact

Potential Allies	Point of Contact

In Step Two, refer to the information cards you completed as part of the Member Engagement exercise. Determine whether you already have members connected to these potential allies, who could serve as the Association’s point of contact.

Potential Coalition Partners

In addition to categories and organizations listed below, consider groups that serve specific populations that may be affected by the issue your advocacy plan addresses.

Education			
Affinity associations (AAUW, special education, math, etc.) Counselors	School business officers Directors of pupil transportation services	Principals Administrators	School board association PTA/PTO
Labor			
<ul style="list-style-type: none"> • Local federations: AFT, AFL-CIO, AFSCME, SEIU, CWA, TWU, UFCW, IBEW, IUOE, LiUNA, USW • Central labor boards • Individual locals 			
Faith-Based Organizations			
Individual clergy Inter-faith councils State/local councils of denominations State/local chapters of national faith-based organizations	(Examples:) <ul style="list-style-type: none"> • Anti-Defamation League • Baptist Center for Ethics • Baptist Joint Committee on Public Affairs • Religious Action Center of Reform Judaism • Comunidades en Acción y de Fé (CAFÉ) 		
Civil Rights Organizations			
<ul style="list-style-type: none"> • American Civil Liberties Union • Americans United for Separation of Church and State • Gay, Lesbian & Straight Education Network 	<ul style="list-style-type: none"> • League of United Latin American Citizens • NAACP • National Urban League • People For the American Way 	<ul style="list-style-type: none"> • Leadership Conference on Civil Rights • Mexican American Legal Defense & Education Fund • Southern Poverty Law Center • Asian American Legal Defense and Education Fund • Children's Defense Fund 	
Civic and community organizations, fraternal and social groups			
<ul style="list-style-type: none"> • Neighborhood associations • Historical societies 	<ul style="list-style-type: none"> • Kiwanis • Lions 	<ul style="list-style-type: none"> • Rotary • Elks 	<ul style="list-style-type: none"> • Chamber of Commerce (and Jaycees) • Fraternities and sororities
Health care			
<ul style="list-style-type: none"> • Hospital associations and individual hospitals • Dental and optometry organizations 	<ul style="list-style-type: none"> • Red Cross • Disability advocates • Social workers 	<ul style="list-style-type: none"> • Family service advocates • Diagnosis-specific associations (addiction, diabetes, MS, cancer, etc.) 	
Law enforcement – police chiefs, sheriffs, etc. have actively supported after-school programs, for example.			
Advocacy groups – consumer groups, Leagues of Women Voters, etc.			
Business organizations – bankers, realtors, home builders, bar associations, etc			
Youth organizations – Boys and Girls Club, college-based student groups, etc.			
Environmental activists – Sierra Club, Audubon Society, etc.			
Senior citizen groups and individual senior centers			
Veteran's organizations			
Rural advocacy organizations – Organizations Concerned About Rural Education (OCRE)			
Advocates for the homeless – National Coalition for the Homeless			

Define Goals

Frequently, advocates identify solutions without first clarifying the problem they want to solve. This can create challenges down the road when participants are unable to explain why the proposed solution is good for students, and why the public should support it. Understanding your goal is essential to being able to promote it.

One way to identify the problem you would like to solve is by utilizing NEA's Opportunity Checklist, which reviews the components of a great public school, and by conducting an Opportunity Audit. The Audit guides you through an inventory of the specific resources, facilities, and services to which your students have access, and thus reveals what essential elements of a great public school may be missing. The Great Public Schools (GPS) Indicators Framework can then help you identify solutions that address those specific needs.

After identifying the need and a possible solution, the next task is determining whether an advocacy plan to achieve that goal is viable. Is the local environment conducive to achieving your goal? If not, what preliminary steps will be required to create a more receptive environment? Even if you are unable to achieve your primary goal, determine if a campaign will help the Association achieve secondary goals, such as the following:

- ▶ Establish the Association's reputation as a leader on this issue
- ▶ Engage members
- ▶ Identify emerging leaders and provide them with growth opportunities
- ▶ Build relationships with other organizations
- ▶ Attract new members
- ▶ Enhance the Association's media presence
- ▶ Modify the local power structure and improve the Association's standing
- ▶ Build internal capacity for the next effort

As you develop your advocacy plan in Phase Two, include benchmarks for achieving both the primary goal and these secondary goals.

Define Goals: Exercise

Review the data collected through NEA's Opportunity Checklist and the Opportunity Audit to identify issues and areas of concern that resonate with educators, parents and community members. Brainstorm solutions and then evaluate one proposal using the questions below.

For example, if your research reveals that not all students in your district have access to full-day kindergarten (an indicator of school readiness), and your Association would like to advocate for full-day kindergarten for all eligible students, you might want to consider the capacity challenges:

- ▶ Are there classrooms and staff sufficient to meet the need?
- ▶ How would the district fund those expenses, and how might that impact other Association priorities?
- ▶ Who are the decision-makers, and what will it take to win their support?
- ▶ Are there bargaining implications?

Proposed Goal:

Will improve students' lives	Yes/No
Will be felt widely and deeply.	Yes/No
Is consistent with our values and vision	Yes/No
Is achievable within a measurable time frame	Yes/No
Is understandable by members and the public	Yes/No
Is affordable <ul style="list-style-type: none"> ▶ Financial costs ▶ potential political risks ▶ possible membership risks 	Yes/No
Will build internal capacity, and position the association for the next advocacy effort?	Yes/No
Will give members a sense of their collective power	Yes/No
Will alter the relations of power in this community	Yes/No
Will grow membership	Yes/No
Can we move decision-makers? (What will be required?)	Yes/No

Engage the Public

You can mobilize allies in your community and solicit support for your plan of action by increasing awareness of the issue. Educators can provide the personal touch that conveys what is at stake for students. This is often the key to swaying public opinion.

You can solicit public support in a variety of ways. The easiest is simply by speaking with colleagues, friends and family. Provide members with information that will allow them to engage in conversations wherever the issue arises--meetings, houses of worship, chance encounters at the grocery store, in social situations. Encourage members to throw house parties to discuss the issue and your plan to address it.

As members become more active and confident in discussing the issue, encourage them to attend public events such as school board meetings, sessions of the city or county council, legislative hearings, voter forums, and other venues in which the issue may arise. Empower them with talking points and sample questions to ask the speakers. Suggest they bring friends and allies for support. Encourage emerging leaders to ask to be on the agenda to speak at these meetings. Indeed, members who also participate in civic organizations, faith institutions, and community groups should request an opportunity to address these groups and share how members of those groups can help.

Members can also engage the public through traditional and social media. Provide talking points and model letters, posts, and tweets, as well as links for additional information. Letters to the editor are widely read and are an effective means of increasing awareness of the issue. Call-in news shows are another way to reach a broad audience as well as decision-makers.

Most communities have local boards, committees, councils, and other opportunities for the public to participate in civic affairs. Encourage members to seek positions on these bodies to ensure the inclusion of voices that support public education.

As your advocacy plan progresses, you may reach a point at which a petition may be an appropriate tactic for moving policy makers. Members can participate in efforts to collect signatures of people who support your goal.



The possibilities are limitless when leaders engage and organize others. Organizing is a skill that can transform relationships with and among a diverse community to harness power of collective action.

www.nea.org/assets/docs/Curriculum%20Outline%20Organizing_2.pdf

Engage the Public: Exercise

In this scenario, your local has requested an audit of all the high-stakes standardized tests that students in your district are required to take. Review the following tactics and evaluate which would be the most effective way to begin to inform the public of your advocacy plan, and to enlist their support. What would each tactic require, and what are the potential benefits?

Example: **School District Canvassing**

Requirements	Benefits
<ul style="list-style-type: none"> • Recruit a local team. • Provide training • Create resources (e.g., survey, pledge card, action card, petition) • Identify communities your team has a connection to as well as those which are part of the plan • Assign an organizer to coordinate the logistics, check in with team members, and maintain team recruiting efforts • Secure media coverage to document and promote the effort during field work 	<ul style="list-style-type: none"> • Authentic community engagement • Demonstrates solidarity with the community • Builds morale and fellowship • Generates media • May move policy makers • Provides data to support the effort • Presents a positive platform for strong public schools • Develops leadership and communication skills

a. Enlist educators to inform parents of their students about the issue

Requirements	Benefits

b. Hold house parties at the homes of community members

Requirements	Benefits

c. Hold a petition drive

Requirements	Benefits

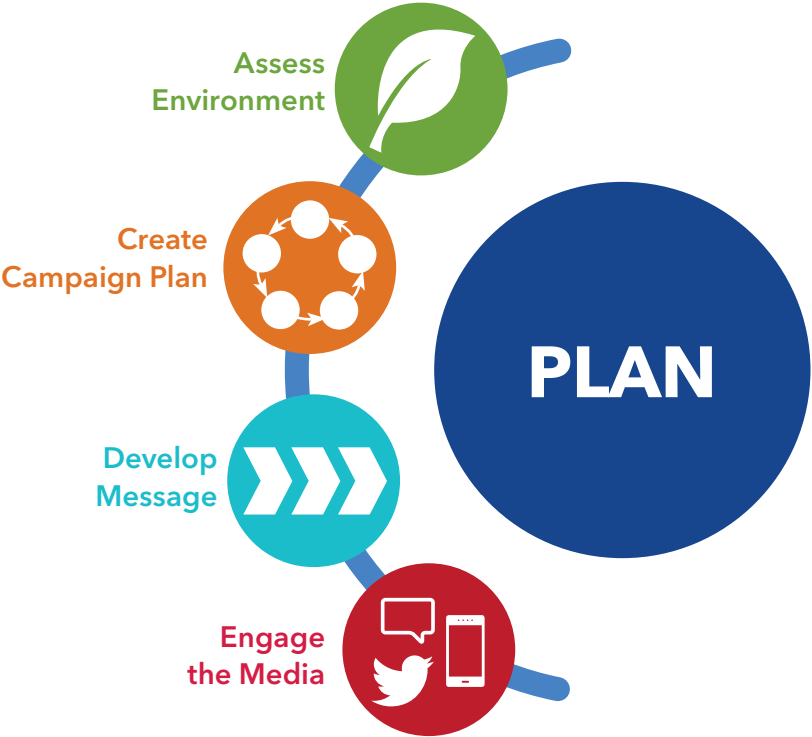
Phase Two: Plan

TAB FPO

TAB Back FPO

Phase Two: Plan

In this phase, you will assess your internal and external environment, create your advocacy plan (including a schedule of events and activities, assigned responsibilities and deadlines, a budget, and benchmarks to measure success); develop a message, and engage the media. From the beginning to the end of the planning process there should be embedded metrics that identify how effective your efforts are at building power, growing membership, and identifying and developing new leaders.



Assess the Environment

If you don't know where you are, it's hard to map how to get where you want to be. A tried-and-true method for analyzing one's environment pursuant to developing an advocacy plan, is by conducting a SWOT analysis: Strengths, Weaknesses, Opportunities and Threats. You may find it useful to categorize your strengths and weaknesses using the mnemonic PRIMO, which stands for People, Resources, Ideas, Marketing (communication), and Operations (infrastructure). The acronym PESTLE may be helpful in categorizing your opportunities and threats. It stands for Political, Economic, Social, Technological, Legal and Environmental factors. Some questions to stimulate brainstorming on these topics are listed below.

PRIMO

People. Who are your allies and who are your adversaries? What proportion of your membership will support the effort and participate in it? Are these members also active in other organizations that share the goal? Are you aware of educators who would actively oppose what you're trying to achieve?

Resources. What financial and human resources can be devoted to the effort? How many of your members have received advocacy training, how many trained advocates will you need, and how will you provide the necessary training? What resources can be devoted to internal and external communications? What staff resources are available? What resources can your coalition partners bring to the table? What do you know about the school budget and what resources might be available to fund your objective? What are your collective bargaining rights?

Ideas. Who in your organization can be the subject matter expert? What external resources are available to develop broader understanding?

Marketing (Communications). What internal networks are in place to enable effective communications with members?

Operations. What professional learning opportunities are or could be scheduled to share information and recruit volunteers? Could the existing member engagement program be deployed to support this advocacy effort?



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PESTLE

Political. Who holds the power to authorize the change you seek, and how can you reach them? Are they with you, against you, or undecided on this issue? Whose opinions on this issue do they respect? What influence does your Association (or individual members) hold with those people or groups? Can you bring those power brokers into your coalition?

Economic. Evaluate whether funding would be available for your goal, and what programs, projects and organizations would also be competing for those funds.

Social. What is the public's attitude toward local schools? Toward the Association? What are the areas and issues of greatest concern? Are there social venues through which you could reach the public?

Technological. Does the Association and its members have the technological infrastructure and capacity to conduct all aspects of the proposed plan? What are the external technological challenges?

Legal. Is the Association in compliance with all state and federal regulations? Has the Association received an independent audit recently? Are policies and practices in place to minimize potential legal exposure? Are there any federal or state statutes that support or prohibit the action you are considering?

Environmental. Do you have polling data indicating how receptive the general population in your area would be to your advocacy? Are certain geographic areas or demographic groups more or less inclined to support your goal?

Assess the Environment: Exercise

Convene your planning team to complete a SWOT analysis. A template is provided below. Do not hide or underestimate threats or weaknesses—failing to address them will not make them go away. The goal is not necessarily to neutralize them, but to raise awareness, and prepare.

SWOT Analysis Worksheet #1

<p>Strengths</p> <p>People:</p> <p>Resources:</p> <p>Ideas:</p> <p>Marketing:</p> <p>Operations:</p>	<p>Weaknesses</p> <p>People:</p> <p>Resources:</p> <p>Ideas:</p> <p>Marketing:</p> <p>Operations:</p>
<p>Opportunities</p> <p>Political:</p> <p>Economic:</p> <p>Social:</p> <p>Technological:</p> <p>Legal:</p> <p>Environmental:</p>	<p>Threats</p> <p>Political:</p> <p>Economic:</p> <p>Social:</p> <p>Technological:</p> <p>Legal:</p> <p>Environmental:</p>

After completing the SWOT analysis, generate some ideas for how your Association can exploit the strengths and opportunities, and reduce the weaknesses and threats. Use Worksheet #2 below to complete this exercise. These ideas may then form the basis for strategies, tactics, and activities incorporated into your plan.

SWOT Analysis Worksheet #2

Goal:			
Our Strengths:	Ways to amplify:	Our Weaknesses:	Ways to reduce:
Our Opportunities:	Ways to amplify:	Our Threats:	Ways to reduce:

Create an Advocacy Plan

You've heard the old adage: No one plans to fail; but they do fail to plan. Your plan is the roadmap to your goal. Obsessing over the details of your plan is time well spent, as are frequent references back during the course of the campaign to ensure that you are on track, that deadlines are being met and responsibilities fulfilled, and benchmarks are being measured. Finally, do not hesitate to make mid-course corrections.

The first step in developing your plan is distinguishing between a strategy and a tactic. In The Art of War, Chinese military strategist Sun Tzu wrote that strategy without tactics is the slowest route to victory, and tactics without strategy is the noise before defeat. Your plan must include both, and must distinguish one from the other. Strategies are long-term plans for achieving goals. Tactics are the short-term means by which you implement these strategies.

Strategy	Tactic
Planning	Doing
Purpose	Task
Anticipation	Reaction
Journey	Trip
Leverages strengths	Provides measurable accountability
Defines vision	Achieves milestones

Tactics typically have a start and end date, action items to help achieve the tactic, and costs assigned to each. Knowing your anticipated costs is essential, as you may need to seek external funding sources to support the plan through its completion, and funders will want to see your budget. Also be sure to assign responsibility for each tactic, and plan out your schedule with the school calendar in mind. Who can be responsible for activities during back-to-school, fall recruitment drives, sports seasons, exams, and holiday and semester breaks? Know your internal capacity to maximize participation and attention.

Finally, what does success look like? How will you know when you have achieved your goals? Establish benchmarks for what you would like to achieve along the way to help determine the effectiveness of your plan. Debrief after each event to evaluate, measure your achievements and recalibrate the plan.

Create an Advocacy Plan: Exercise

In this scenario, your Association and coalition partners have identified a need in the community for access to health care, social services, English language instruction, job training, and parenting education support. Providing these extended services in the schools would be more convenient to students and their families, and would be a fiscally responsible use of public facilities.

Discuss effective strategies to engage members, to secure media attention, to promote public support, and to persuade decision-makers to create community schools in your district. One sample tactic has been included for each strategy. Brainstorm additional tactics to implement your strategy, and carefully consider all the activities involved in successfully deploying a tactic.

While establishing deadlines, keep the school calendar in mind. Schedule activities for every month, to sustain momentum. Identify metrics to measure how you are building internal capacity, engaging current members, and gaining new members. Consider how each activity can support these secondary goals. Some examples are provided below.

Planning Template

MEDIA STRATEGY

Goal: Disseminate the message to 25% of the local population			
Tactic 1 – Conduct a news conference			
Activity	Deadline	Budget	Responsible Party
Select a location for the press conference—Local headquarters or a school that illustrates the topic, for example, and a room big enough for journalists and their equipment, and with adequate electrical outlets, and a second room available for follow-up interviews.			
Develop clear, colorful visuals to illustrate the topic such as photos, charts and graphs.			
Issue a news release 3-5 days in advance identifying the date and time, place and topic. Time it to coordinate with media deadlines.			
Invite officers and subject matter experts to attend, along with coalition partners.			
Follow up with invitees to maximize attendance.			
Prepare media kits for those attending (and to be sent to those who do not), including the following: <ul style="list-style-type: none"> • Spokesperson’s statement, and biographical information • News release, and copies of any charts and graphs displayed • Fact sheet on the Association, and a slide of the logo 			
Consider room set-up: Use a lectern that can hold several microphones. Print name cards for speakers. Prominently display visual aids/posters in the front of the room. Provide enough chairs for reporters/staff. Display the Association logo in a prominent spot that is not affected by glare. Ask media to sign in so you can follow-up. Provide refreshments (optional).			

Equip speakers. Role-play with the speakers and ask difficult questions to prepare them.			
Start on time. Have media liaison or PR committee introduce the speakers. Allow questions after the statements. End on time (30 minutes).			
Measure impact. Collect data on attendance, new media contacts, quantity and quality of media coverage, impact of coverage on member interest (calls, Web traffic, volunteers) and coalition interest (new organizations).			
Tactic 2 – Letters to the Editor			
Activity	Deadline	Budget	Responsible Party

MEMBER ENGAGEMENT STRATEGY

Goal: Increase by 10% the number of members who participate in Association activities.			
Tactic 1 – Conduct site meetings			
Activity	Deadline	Budget	Responsible Party
Schedule the meeting at a time convenient to most members.			
Create an agenda designed to inform, answer questions, receive input, ask for participation in a specific activity, and determine support. If the agenda is too long, schedule a series of shorter meetings.			
Disseminate the agenda at least one week in advance.			
Send reminders the day before.			
Serve refreshments.			
Tactic 2 – Conduct a phone bank to turn members out to a school board meeting			
Activity	Deadline	Budget	Responsible Party

PUBLIC ENGAGEMENT STRATEGY

Goal: Reach 25% of the population through media or personal contact.			
Tactic 1 – Letters to Parents			
Activity	Deadline	Budget	Responsible Party
Provide members with union letterhead stationery.			
Encourage members to write notes to parents on a regular basis about how their children are doing. Provide samples.			
After a relationship is established, members can discuss the issues affecting their children’s education, then the solution(s), and finally how parents can support those efforts. Provide examples of what information would be appropriate at each level.			
Tactic 2 – House Parties			
Activity	Deadline	Budget	Responsible Party

POLITICAL STRATEGY

Goal: Secure a sponsor for a school board resolution calling for the implementation of a community school pilot project.			
Tactic 1 – Conduct a coalition briefing for school board members			
Activity	Deadline	Budget	Responsible Party
Secure a venue.			
Send a save-the date invitation.			
Determine speakers.			
Develop hand-outs.			
Determine whether to invite the media.			
Send reminder notices.			
Arrive early for room set-up; including sign-in forms, if any.			
Greet school board members and staff.			
Follow up with members to determine if additional information is required.			
Secure commitment.			
Tactic 2 – Schedule one-on-one meetings with school board members			
Activity	Deadline	Budget	Responsible Party

Internal Capacity Metrics	Current	Growth Goal
Membership Contact information collected Attendance at membership events One-on-one conversations Home visits Membership		
Worksite Leaders		
Volunteers Attendance at Association events Volunteers Volunteer coordinators		
Early Career Educators Engaged One-on-one conversations Requests for resources		
Family & Community Member Engagement Participation in Association events Coalition partners		
Digital Engagement & Local Communications Capacity Social media activity Website traffic E-mail communication		

Develop Your Message

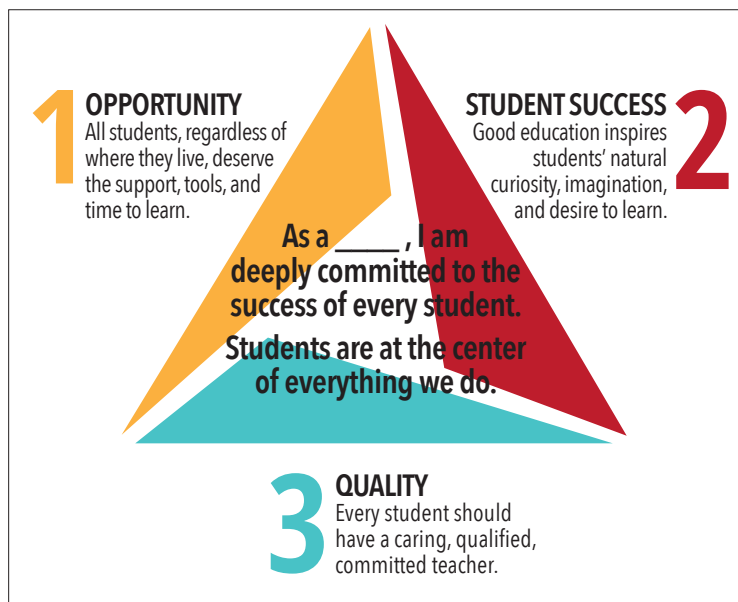
Your message is the one or two or three ways you to talk about an issue.

- ▶ It should reflect your values and your priorities.
- ▶ It should make a point.
- ▶ It should include facts, but not be *just* facts. It should be true, and believable.
- ▶ It should resonate with the target audience at an emotional level.

Your message should provide the framework for a compelling narrative that conveys the values of the campaign, connects with the emotions that inspire action, and allows educators to tell the story of why this issue is important for students.

Name your campaign. The name must clearly explain your goal and be easy to remember.

Be direct and positive. State your goal as an affirmative. What are you FOR?



- 1. Opportunity**—speak about how your proposed solution will enhance opportunities for all students
- 2. Student Success**—show how your solution will provide what students need to achieve a well-rounded education and be inspired to be life-long learners.
- 3. Quality**—tell how your efforts will provide every students with caring, qualified, committed teachers.

Talking Points: Using talking points like the ones below, you can move your message using your voice as an educator to ensure opportunities for success for all students.

- ▶ Show me a school that works well, and I'll show you a school that has the resources and programs to support, encourage, and inspire students at every level. Take a clipboard, a piece of paper and a #2 pencil and walk into the best school in your state. Just start writing down what you see: a band; teachers who are certified to teach physics and calculus; counselors to help students make life-altering choices; caring and supportive staff who welcome families into the school; theater class; girls' volleyball; a chemistry lab; classes that offer college credit; debate; robotics; foreign languages.
- ▶ Those things—the things that make schools great, the things that build curiosity and instill a love of learning—that's your state standard. It is what every child deserves. And it shouldn't be available based on how much their parents make, what language they speak at home, and certainly not what neighborhood they live in.
- ▶ Take that list into every school in your state and see where kids have access to what makes a school great and where they don't. And then fix it. Work with your colleagues, parents, school board members, community leaders, state education officials, and other friends of public education to fill in the gaps.
- ▶ ESSA represents an opportunity to ensure success for each and every student. Good implementation of the Every Student Success Act will promote opportunity for all students by assessing the resources that are available in their schools and closing opportunity gaps where they exist. Then, educators can focus on what matters most: inspiring students' natural curiosity, imagination and desire to learn.
- ▶ Every student deserves a well-rounded curriculum that will nurture his natural curiosity, imagination, and desire to learn. The new education law, the Every Student Succeeds Act or ESSA, will get us closer to achieving that goal for all students if we make our voices heard in how it's carried out.
- ▶ The best opportunities for our students arise when we're at the table driving the discussion, and the new education law gives us the opening to do that. The law is called ESSA, and it will only work for our students if we get involved and shape how it's put into action in our classrooms and schools.
- ▶ We can determine what success looks like for our students under the new education law. The law is known as ESSA, and "student success" is at the heart of it. The best part about it is that we get a say in determining what factors lead to student success.
- ▶ You have the opportunity to ensure that all our students have the support, tools and time they need, but only by getting involved in how the new education law is carried out. Make sure our students get the most out of ESSA by putting your two cents in right now.
- ▶ We're the ones who are best equipped to ensure student success, and the new education law lets us make our voices heard. We've got a seat at the table to determine how the new law, ESSA, is carried out and how to make its promise of greater opportunity real for our students.

- ▶ Thanks to the new education law, educators and support staff—the professionals who know the kids by name and understand how to unlock their potential—will play a key role in shaping policies that affect students and making school decisions.

Now share your message! Do so consistently and repeatedly.

Communicate internally. Make sure your internal communication network is effective. Leaders, staff, and members should all know the Association’s position and message. Share reports, position papers, and press releases internally. Include articles about advocacy activities in Association and partner newsletters. Consider providing updates through every means of communication used by your members—listservs, group texts, Facebook, Instagram, blogs, podcasts, etc.

Communicate externally. Keep in mind the multiple audiences that have a stake and/or interest in the issue, including members, allies, legislators, media, minority communities, parents, education and community leaders, business organizations, and faith leaders. Consult the leaders of these audiences regarding the best way to share information.

Develop Your Message: Exercise

Using the NEA Message Guidance, explain how your advocacy efforts will:

1. Enhance opportunities for all students

2. Provide what students need to achieve a well-rounded education and be inspired to be life-long learners.

3. Provide every student with caring, qualified, committed teachers.



To engage the public, you will need the skill to deliver engaging and persuasive speeches, presentations, and media interviews that motivate audiences to take action. For more information to help improve your Communication competency, visit: www.nea.org/assets/docs/Curriculum%20Outline%20Communication.pdf

Engage the Media

Getting your message out to the public is vital to your success. Local newspaper editorial pages and call-in shows can be powerful vehicles for stimulating and even influencing public debate. They provide opportunities to make the case for your issue, or respond to related events. Because policy makers are frequently guests on call-in shows, these are a chance to present your message to a critical audience. The editorial pages of local papers are another way to communicate with local officials.

Know the print, radio, television, and digital options to reach the public in your area, including media that target niche audiences. Develop relationships with news directors, assignment editors, education reporters, talk show producers, bloggers and podcast hosts. Learn their deadlines, and whether they have special editions scheduled based on the calendar. Make Association and coalition leaders, spokespersons, and members available for interviews.

Help the media promote your effort. Send announcements and agendas for events you would like covered well in advance, and follow up with phone calls. Develop a press kit, and pitch story ideas that will interest the public.

Help your leaders and members promote the advocacy effort as well.

- ▶ The media can help explain the issue, your solution, why this matters to the audience, and why they should support your cause. Be clear, concise, and jargon- and acronym-free, and include a call to action - let the public know how they can help.
- ▶ Provide members with sample tweets, talking points and links they can share. Encourage them to present the goal from their perspective, based on their experience and expertise as education professionals.
- ▶ Enlist Association and/or coalition leaders to conduct television and radio interviews, and to speak at community issue forums and civic organization meetings. Provide briefings and talking points to help them stay on message.
- ▶ Recruit members to call in to radio and television talk shows, and provide them with media training.
- ▶ Encourage members to share their enthusiasm and passion for the subject, and to avoid sarcasm. Some media outlets may seek to provoke members to create an alternative story. Stay calm, and stay on message!

Know what is being said and written about your issue, and by whom—both positive and negative.

Engage the Media: Exercise

In this scenario, your Association is soliciting support from your local school board to conduct a testing audit. One member of the school board strongly supports standardized tests, asserting that they provide an objective measure that allows taxpayers to know whether the schools are successful, and whether teachers are effective. (This board member also supports test-based merit pay.) Another board member is supportive, but is concerned about the estimated cost of the audit. Three members are uncommitted.

1. Outline a letter to the editor of the local newspaper.
 - ▶ Introduce yourself. Who you are, why are you writing, and your qualifications; i.e., why the public should listen to you
 - ▶ Identify the problem.
 - ▶ Describe your proposed solution
 - ▶ Provide a local illustration—How does this problem affect students in your community, and how would your solution help them?
 - ▶ Call to action—what would you like the community to do?

Who?	What? (problem)	What? (solution)	Local Impact	Call to Action

What other media outreach would you include? [Include electronic/social media]

Engage Policymakers

Sometimes the only way to achieve change or to secure the resources you and your students need is by persuading decision-makers to enact, amend or repeal policies, regulations or legislation. In many respects, advocating to elected and appointed officials is no different from other forms of advocacy. There are some important distinctions however, and we recommend coordinating your grassroots lobbying activities with your Association.

That said, you can increase participation in grassroots lobbying by offering members training opportunities and low-risk activities that will allow them to learn the skills and develop confidence.

Calling. A phone call is quick and easy. Since it can be done at a moment's notice, phoning is an attractive method for making contact. For these same reasons, it is critical that you make sure the phone call is effective. You do not need to be an expert on the issue to be persuasive—you just need to incorporate your personal perspective.

Writing. Sending an e-mail offers you the opportunity to share more information than in a phone call. It can also be an effective strategy for following up on a phone call or visit. The disadvantage of letters is that you are not directly interacting with the policymaker; they can't ask questions, share their position, or respond to a specific request. For these reasons, you might consider following up your email with a phone call or visit.

Meeting. A face-to-face meeting can be a powerful opportunity to advance your agenda. The meeting can also position you as a reliable expert on your issue and an important ally—if it is conducted effectively. Your strategy should include meetings as an Association and meetings scheduled with other members of your coalition.

Note: Do not debate with elected officials, either in person or over social media. It is counterproductive. Respectfully agree to disagree and move forward.

Engage Policymakers: Exercise

Schools board resolutions can put public officials on notice, in a public way. They communicate that educators want and demand a seat at the table, along with other stakeholders, to ensure that the policies being considered, adopted and implemented actually benefit students. The resolution can also be an opportunity to involve other stakeholders.

In this scenario, your Association has persuaded a friendly member of the local school board to introduce this resolution:

WHEREAS, our nation's future well-being relies on a high-quality public education system that prepares all students for college, careers, democracy, and lifelong learning; and

WHEREAS, our nation's school systems have been making too many critical decisions without benefit of the voices and expertise of the educators who know students' names in our schools; and

WHEREAS, our nation's public school systems have been spending growing amounts of time, money, and energy on high-stakes standardized testing, in which student performance on standardized tests is used to make major decisions affecting individual students, educators, and schools; and

WHEREAS, the overreliance on high-stakes and standardized testing in state accountability systems is undermining educational quality and opportunity in U.S. public schools by hampering educators' efforts to focus on creativity, problem solving, collaboration, communication, critical thinking and deep subject-matter knowledge that will allow students to thrive in a democracy and an increasingly global society and economy;

WHEREAS, a child's chances for success should not depend on living in the right zip code; and

WHEREAS, the President of the United States signed the Every Student Succeeds Act on December 10, 2015 based on educators' calls to end No Child Left Behind's misguided federal mandates;

THEREFORE, let it be resolved that the [your School District Governing Board name] supports the collaborative development and implementation of a plan with the [your Local Affiliate name], parents, students, and community members to ensure the opportunities for a well-rounded education presented by the Every Student Succeeds Act are realized by including all stakeholders in decision-making; and

THEREFORE, let it be resolved that [your School District Governing Board name] calls on the governor, state legislature, and state education boards and administrators to reexamine public school accountability and finance systems in this state to ensure that accountability for district, school and student success are based on multiple forms of evidence that feature indicators of school and student supports and success; and that those indicators are used to drive resources and a system of collaboratively developed (by all stakeholders) improvement strategies to schools so that all students receive the opportunities and supports they deserve.

Members have engaged with the parents of their students to inform them. They have also conducted a series of house parties to inform and engage other members of the community. They have focused on the need for collaborative development and implementation of (1) a local plan that incorporates multiple measures of student achievement, (2) a district report card that includes an opportunity indicator, and (3) school improvement strategies aligned with a collaboratively conducted needs assessment.

Your advocacy operation has a website and an active social media strategy supported by coalition partners. The local newspaper has published a favorable editorial, but you do not yet have enough votes on the school board to pass the resolution.

In small groups, plan and role-play a face-to-face coalition visit with one of the school board members who does not yet support the resolution. Use the template below to plan your visit. Consider which coalition partners you would like to include.



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Face-to-Face Meeting Planning Template

Provide your name and contact information, especially if you are a constituent.
Identify the purpose of your call/visit.
Acknowledge prior support, if any.
If this particular policymaker has opposed the Association in the past, explain how this issue is different (or ask a coalition member with a friendlier relationship to take the lead).
Provide local context. Plan two or three observations or arguments that demonstrate the connection between what you seek, and what students in your community need.
Solicit support for the issue or position you are advocating, and try to get a commitment.
Lay the groundwork for further contact. Provide written background information and invite the policymaker to review it and contact you with questions. Indicate you will follow up, perhaps with a request for a face-to-face meeting.

Before: Know the policymaker’s position on the issue and opinion of your Association.

During: Stay on message. Resist efforts to sidetrack the conversation. Avoid ad-libbing. “I don’t know, but I’d be happy to get back to you” is a valid response when asked a question to which you do not know the answer. This simply provides an opportunity for follow-up.

After: Send a note expressing appreciation for the policymaker’s time and responding to any information requests made at the meeting. Tell your Association and/or coalition about the visit, including what was said, and any commitments on either side.

Phase Three: Act!

TAB FPO

TAB Back FPO

Phase Three: Act!

Now is the time to put your plan into action.

Check your plan and calendar regularly to confirm that activities are proceeding as scheduled. Check in with the people responsible to make sure they have everything they need to be successful. Capture and record data relevant to your metrics. Revise the plan as needed, and make notes about why the changes were needed, so you can incorporate those learnings into your next plan.



Advocacy Plan Implementation Calendar

Use a template such as the sample below to keep track of scheduled activities, and the people responsible for meeting each deadline. This can also provide space for you to debrief on the outcome of each activity, noting what is most effective and why, and what changes may be needed to activities scheduled for later in the year. You can also use this to capture metrics such as conversations, visits, and attendance at Association events.

AUGUST

Member Engagement Activities	Name	Responsibility/Deadline	Outcome/Metrics
Sample: Ensure volunteer list is accurate and up-to-date	Jo	By August 31: Contact volunteers and confirm continued interest.	Baseline of Association volunteers:

Community Engagement Activities	Name	Responsibility/Deadline	Outcome/Metrics
Sample: Review existing partnerships for ROI	Sam	By August 31: Consult Association POCs for each formal partnership.	Baseline of organizations with whom the Association partners:

Media Engagement Activities	Name	Responsibility/Deadline	Outcome/Metrics
Sample: Inventory media contacts	Mary	By August 31: compile accurate contact list for all local traditional and digital media outlets.	Baseline of media with whom the Association has a relationship

Public Engagement Activities	Name	Responsibility/Deadline	Outcome/Metrics
Sample: Inventory internal media properties	Don	By August 31: ensure all internal media properties are functional and up-to-date.	Baseline outreach capacity:

Political Engagement Activities	Name	Responsibility/Deadline	Outcome/Metrics
Sample: develop and schedule advocacy training for BOD	Liz	By August 31: Contact meeting planners and secure time at Association events to provide advocacy presentations	Meetings: Members:

Finally, what does success look like? How will you know when you have achieved your goals? Establish benchmarks for what you would like to achieve along the way to help determine the effectiveness of your plan. Debrief after each event to evaluate, measure your achievements and recalibrate the plan.

Phase Four: Evaluate

TAB FPO

TAB Back FPO

Phase Four: Evaluate

Congratulations! You achieved your goal! It wasn't a 100% success? No worries—celebrate what you did accomplish. Thank everyone who played a part—and let them know what's next. Maintain enthusiasm and keep momentum going. Your Association is a force for change!

Evaluate what went well and what you would like to do differently to prepare for your next advocacy effort. How can you build your communications infrastructure, for example? Does your leadership development program need tweaking? What member and community outreach activities are most effective, and which can you eliminate?

Share both your successes and what you have learned. NEA EdCommunities offers a forum for you to promote your good work with colleagues around the country, and learn from them.

Finally, keep your eyes on the prize. Achieving an advocacy goal is not the end; it is the means to an end. As discussed earlier in this handbook, these goals are mechanisms to achieve the programs and resources our students need to succeed. Once a sought-after policy or structure is adopted or a collaborative structure put in place, it is our responsibility to ensure it is implemented as intended. Monitor programs and hold decision-makers accountable. Make sure data are collected so you have the evidence to support advocacy for changes, maintenance, or expansion.





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