



Advocacy Tool Kit

Equity, Adequacy and Timeliness

To work with stakeholders everywhere
to inform, connect and secure positive
and appropriate actions from state
government to support public schools
in every corner fo the New York

Statewide School Finance Consortium
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February 2013

(Your School Logo)

A Letter from the Superintendent

Dear Community Advocate,

Thank you for agreeing to learn more about our advocacy efforts. We are excited about your interest in becoming a strong advocate for our school district.

Assemblymen and Senators want to make laws that reflect the knowledge and interests of the people they represent. To do this effectively, they must interact and communicate with individuals who are affected by a particular issue. When the issue is ensuring the survival of our public schools, that individual is YOU. As a teacher, parent, or community member of the education community, Senators and Assemblymen need your insight about how changes in state aid will devastate school districts like ours.

This advocacy toolkit is devoted to helping you become an effective advocate for sound state education policy. It is based upon documents created by Learning Forward. The toolkit answers questions about who you should contact, what your message should be, and how you should deliver your message. The toolkit will also address common concerns like, “will they listen to me?” and “will I get in trouble at work for doing this?”

Thank you for your interest in assisting the *(Your School District Name)* with these efforts and for the impact they will have on our district and our students.

Sincerely,
Superintendent of Schools

District Information

(List Your District Information Here)

Our Advocacy Resources

(List Your District Resources Here)

Superintendent

Board of Education President

Business Administrator

Our Vision

(Insert your District Vision Statement here)

Statement of Purpose

Poor, (rural, urban, suburban) school districts, like *(Your School District Name)*, find themselves fighting for their very existence. We simply cannot sit idly by and watch districts like ours become fiscally insolvent due to state aid cuts, increasing mandates and inaction by our elected officials. Our school district sustained a gap elimination adjustment of \$_____ per pupil in last year's budget, while many wealthy districts lost \$600 or less per pupil. Additionally, the wealthy districts in our state have expansive programs that rural districts simply do not have. As such, districts like ours have had to cut into their core programs, while wealthy districts, if they cut anything at all, cut programs their (rural, urban, suburban) counterparts did not even have to begin with. Furthermore, wealthy districts generate a great deal more from their tax base, even in with the property tax cap.

WE MUST TAKE ACTION OR ACCEPT THE CONSEQUENCES OF OUR INACTION. WE MUST REMIND OUR ELECTED OFFICIALS THAT THEY REPRESENT US...THEIR CONSTITUENTS. THEY DO NOT REPRESENT OTHER PORTIONS OF THE STATE, NOR DO THEY SERVE THE LEADERS OF THEIR PARTIES. WE NEED AND SHOULD EXPECT THEIR SUPPORT.

This advocacy tool kit is designed to help the residents of our community more effectively advocate on our behalf. Advocacy takes many forms. It can take the form of a letter to an elected official, a comment made a public forum, a letter to the editor, or formal testimony at public hearings. Effective advocates do their homework. They know the issues and plan their communication. Most of all, they give of their time to advance their cause.



It is important for our elected officials to know that our students do not belong to any political party, and quite frankly do not care if our officials are an "R" or a "D." What they care about is receiving a quality education that will prepare them for their future. Thank you for helping to assure that for our students.

Our Advocacy Action Plan

The window of opportunity is actually quite short. This document is being prepared in late January 2013, and a state law calls for our elected officials to adopt a state budget by April 1. With a nominal increase in education spending expected this year, it is imperative the funds are distributed in a manner that is more equitable than in years past. Governor Cuomo, in his State of the State Address, called for rejuvenating our regional economy. Doing so is fully dependent on maintaining quality school systems. It is essential that any increases in state aid be distributed by eliminating the gap elimination adjustment (GEA). The GEA took large amounts of state aid away from school districts like ours, while taking lesser amounts from wealthy school districts.

The GEA for our district last year was one of the largest in the state. Our school district is highly state aid dependent, and any loss of aid is devastating to our program.

Thus, we need to act now. The following are the public officials who represent our interests in Albany:

<p><u>Governor Andrew M. Cuomo</u> New York State Capitol Building Albany, New York 12224 Phone: (518)474-8390 Fax: (518)474-1513</p>	<p><u>Assembly Speaker Sheldon Silver</u> <u>Albany Office</u> Legislative Office Building 932 Albany, New York 12248 Phone: (518)455-3791 <u>District Office</u> 250 Broadway, Suite 2307 New York, New York 10007 Phone: (212)312-1420 Email: speaker@assembly.state.ny.us</p>
<p><i>(Insert you Senator's information here)</i></p>	<p><u>Senate Majority Leader Dean Skelos</u> <u>Albany Office</u> Legislative Office Building, Room 907 Albany, New York 12247 Phone: (518)455-3171 Email: skelos@nysenate.gov <u>District Office</u> 55 Front Street Rockville Centre, New York 11570 Phone: (516)766-8383</p>
<p><i>(Insert your Assemblyperson's information here)</i></p>	

ACTION STEP #1

Learn about the Issues that are Impacting Our School District

Learn about the Issues that are Impacting Our School District

All districts in the state have been subjected to a Gap Elimination Adjustment. The GEA was implemented by Governor Paterson and reduced each school district's aid state aid. Last year, there was a slight improvement in GEA. While the average reduction in aid in the state was \$937 last year, nearly all rural school districts sustained much larger decreases in aid. *(Your School District Name)* lost \$_____ per pupil. Below are the per pupil aid losses of many districts in our region:

2012-2013 Gap Elimination Adjustment per Student

*(For illustration purposes only**)*

Phelps-Clifton Springs	\$_____
Manchester-Shortsville	\$_____
Geneva	\$_____
Canandaigua	\$_____
Newark	\$_____
Webster	\$_____
Naples	\$_____
Penfield	\$_____
Rochester City Schools	\$_____
Victor	\$_____
Brighton	\$_____
Pittsford	\$_____

*** Add districts from your region into the chart*

*** GEA's are available from the SSFC website*

****** As the following map of the state shows, our region New York is taking the brunt of the loss of state aid. This map shows the average Gap Elimination Adjustment amount per county. Please note that the two counties in dark blue are Nassau and Westchester counties. These are two of the wealthiest counties in our state, and, indeed, in the nation. Their schools offer their students programs beyond our imagination. Many teach foreign languages beginning in kindergarten, offer up to twenty Advanced Placement courses to their high school students (we can only offer five!), and have extravagant programs in the arts and other elective areas. Their students benefit from gifted and talented programs, planetariums in some of their schools, and extra-curricular programs that we have never had. The counties represented in light blue are slated to receive a cut in aid well below the average in the state. This means they will not have to make cuts anywhere close to the magnitude we will experience. The dark red counties are the primarily rural counties in our state. They have suffered the largest losses in aid.

*** Tell your District's story like in the paragraph above*

In addition to losing this state aid, costs beyond our control are driving our budget upward. Without adding any staff, programs or anything else, our costs will increase by nearly \$_____.

Preliminary estimates indicate the following increases which drive our budget higher:

Description	Cost Increase over Previous Year
Health insurance premiums for active employees	\$_____
Teacher retirement system contribution (mandated by law)	\$_____
Employee retirement system contribution (mandated by law)	\$_____

Health insurance premiums have been increasing by over ten percent annually. Approximately, one out of every eight dollars in our school budget now goes to pay health insurance premiums. Our district has negotiated concessions from our unions nearly every time we have settled a contract. We have literally saved millions of dollars by negotiating lower cost plans into our contracts, joining a health insurance consortium, and working with our health insurance provider to reduce cost. We hope our state officials can assist us in containing these cost increases. We simply cannot sustain the increases we have experienced over the past ten years.

While the retirement system contributions are mandated by law, we believe our state lawmakers can enact laws that would help mitigate these increases. We recognize the value in maintaining retirement systems that are fully funded, but also realize there are ways to reduce this burden on school districts at this time of vulnerability.

Finally, special education costs are spiraling out of control. We need our lawmakers to help us reduce expenses in this area. Special education costs, over which we have nearly no control, are literally taking available funding away from the rest of our students. We call upon our lawmakers to reduce the mandates that drive up our costs.

ACTION STEP #2

Develop and Test Your Laser Talk

We believe that powerful speaking is the key to being an effective advocate for our schools. Advocates speak powerfully by telling gripping stories, and by giving brief presentations that we call "laser talks."

Let's say you have the chance to speak with a member of our state legislature at a town hall meeting, connect with a busy editorial writer on the telephone, or catch the attention of a friend. Typically, you will only have one or two minutes to get your point across. By using the "laser talk" format, you'll make the most of your opportunity.

Each laser talk has three sections. In the first section, you present a problem you want them to know about. Then you inform them about a solution to the problem. And finally, you call them to action.

P stands for **Problem**

S is for **Solution**, and

A stands for call to **Action**

Let's look at each section in more detail. Begin by identifying a problem you want your listener to know about. Try to connect the problem to an issue the listener already cares about. For example, if you are speaking with our Assemblyman, you might let him know you are scared about the type of school district that will remain after we make deep cuts. You might say,

"I appreciate the support you have always given the schools in our community, but I am terrified of what will be left of them if the Gap Elimination Adjustment remains the same. I understand our Board of Education might be forced to cut our athletic program, eliminate elementary art and music, and reduce our kindergarten program to half-day. And, those cuts may not be enough to close our budget gap."

In the second section of the talk, inform the listener about a solution to the problem you just presented. Give examples of how the solution would work, why it would be effective, and how it benefits the poorest. You might cite a recent study, or use other credible statistics. Here's an example:

"Our district lost over \$_____ per pupil in school aid last year, while some of the wealthiest school districts in the state lost less than \$500 per pupil. These cuts will devastate our schools. Please use the state aid increase this year to work to eliminate the Gap Elimination Adjustment as quickly as possible."

The final section of the laser talk is the Call to Action. Calls to action should be concrete, specific, and formed as a yes - no question. An example is the following request you might make of our State Senator:

"Will you be a leader in the Senate in ensuring that all increases in state aid be used to eliminate the Gap Elimination Adjustment?"

Before you give a laser talk, it's a good idea to practice it. Say it out loud to yourself, and then to another person until you feel comfortable with it. Soon you'll be able to make the talk your own, using different sections as you need them and adapting them to different situations. Learning a good repertoire of laser talks to use when the time is right will help make you a powerful advocate.

We also recognize the value of compelling stories. Good storytelling captivates all of us. As we listen to a good story, our common humanity is touched, and we have the potential to be changed.

For instance, consider the following passage:

"I grew up on Long Island where I attended high school. My school district had a planetarium with a full time planetarium director, offered six different languages at the high school level, and provided more than one hundred elective classes to its high school students. Students I graduated with attended Ivy League colleges. Today, one writes for The New York Times, one served four terms in Congress, and one is the most decorated cabaret star in New York City. Quite frankly, I had opportunities that my children will never have here. Yet, the students in our school compete with the students from my high school for the same slots in college. We can't allow the opportunity gap to grow even wider. The economic health of our region New York is dependent on this."

Stories take something that's abstract and impersonal, like a statistic, and turn it into something very intimate and emotional. A good story softens the listener and appeals to their humanity in a way that facts alone cannot.

We are convinced that sharp laser talks and compelling stories about real people can change hearts and minds, and, ultimately, help bring about changes we need in Albany.

ACTION STEP #3

Write a Letter to Your Assemblyman, Senator, and Governor

It's your right to communicate your opinions and knowledge to the people who have been elected to represent you in our state government. These people rely on their constituents to inform them of issues affecting their communities. They want to know what is important to you, and they value your input. Our elected officials often report that they do not hear much from those they represent on many issues. Your advocacy is not just permissible, it's appreciated.

You already know the issues that our school is facing, and you have practiced your main talking points. Now, it's time to communicate the message in writing.

Some forms of written communication are more impactful than others. While e-mails and form letters are fine, personal letters (perhaps even hand written) convey a stronger message. It shows you went out of your way to make known your concerns.

Writing a letter and making a follow-up phone call only takes a few minutes of your time, but it ensures that your representatives know how you want to be represented. When writing a letter, you should include the same points that you refined in your laser talk, including a *statement of the problem*, a *proposed solution*, and the *call to action*. It is best to keep the letters short. Our elected officials are busy people, and a letter that gets right to the point is more likely to be remembered.

Letters to your elected officials should include the following parts:

Introduction

Example:

As a resident of the *(Your School District Name)*, and the legislative district you represent, I am writing to request your support for our school district in these trying financial times.

Statement of Problem

Example:

Our school district lost \$_____ per pupil in the Gap Elimination Adjustment in this current school year. Wealthier schools with much richer programs lost much less. This loss of aid will decimate our school district if it is not rectified. Our school district has already cut nearly fifty positions, nearly eliminated paraprofessionals from our classrooms, raised class sizes, reduced administrative and support staff, and cut some athletic programs. Unless the GEA is eliminated, our school district to may need to fully eliminate our athletic and extracurricular programs, reduce kindergarten from full day to half day, and eliminate countless teachers and support staff. We will be left with a school district in which no parent would want their child educated.

Proposed Solution

Example:

There is one easy solution. Distribute the proposed increase in state aid in a manner that will eliminate the Gap Elimination Adjustment as quickly as possible. This will direct the increased funding to those who have lost the most over the past few years.

Information about the Proposed Solution

Example:

The GEA disproportionately hurts poor rural school districts. The GEA for our district is nearly twice as much as the average GEA in the state. Yet, wealthy districts lost less than half the average GEA. Those districts have much more expansive programming than our district and a greater ability to generate revenue through a modest tax increase. Indeed, even with the property tax cap, those districts are able to generate substantially more revenue than rural districts.

Call to Action

Example:

Will you work on behalf of the poor, rural schools you represent to eliminate the GEA as quickly as possible?

Conclusion, Signature, and Contact Information

Example:

A map showing the impact of the GEA for this current year is attached to this letter. I would be glad to provide more data to you if it would be helpful. Without your help, our school district, and others like ours, will be devastated. I strongly urge you to stand up for our children.

Sincerely,

Be sure to include all of your contact information so your representative can reply to you.

When your letter is completed, your letter should look something like the example on the following page.

SAMPLE LETTER

Date _____

Assemblyman/Senator _____
Legislative Office Building _____
Albany, NY 12248

Dear Assemblyman/Senator _____:

As a resident of the *(Your School District Name)*, I write today to beg your support of our school district. I recognize the difficult financial situation of our state, and am not writing to ask the state to spend more on our schools. I am simply asking you to support a more equitable distribution of state aid.

Last year, our school district, which is highly dependent on state aid, lost \$_____ per pupil in the Gap Elimination Adjustment. Simultaneously, wealthy districts lost much less. Those school districts have much more expansive programs than do we, and their programs could sustain such a loss of aid without deeply cutting into their programs. That can't be said for rural districts like ours.

There is a simple solution to this. This year, use the proposed increase in state aid to work toward the elimination of the Gap Elimination Adjustment. Do not accept any other distribution of state aid. Quite simply, those districts that lost the most aid over the past few years should receive the greatest restorations this year. The average Gap Elimination Adjustment amount in the state last year was \$937 per pupil. Our district lost \$_____ per pupil, while wealthier districts lost less than the average.

As a parent of three children, I am scared. I am scared to think of what will become of the community in which I have purchased a home. And, I am scared to imagine the quality of the education my children will receive if the GEA is not eliminated. Will you vow to only support a state budget that distributes the aid based upon the GEA? Our children, and our region economy, need your support on this.

I have attached a map that shows how inequitable last year's GEA was. I would be glad to provide you with further information if it would be helpful. I beg you to represent our children. Please work with your our region colleagues, regardless of party affiliation, to ensure our region schools are not devastated yet again.

Sincerely,

Address
Phone

ACTION STEP # 4

DEVELOP A RELATIONSHIP WITH THE AIDES IN YOUR ASSEMBLYMAN AND SENATOR'S OFFICE

People are surprised to learn that the often young aides in our elected officials' offices have so much influence on them. Indeed, all elected officials rely heavily upon the advice and counsel of their staff members. Their aides work tirelessly to collect and filter the large amounts of information and requests that bombard their offices. Good advocates know and understand this and work to build great relationships with these staff members.

Here are some suggestions for building and maintaining strong relationships with the staff members in your Assemblyman's and Senator's office:

1. Learn about your Assemblyman and Senator. It is easy to be intimidated by those who serve in elected office, but remember they are real people too. A Google search of them will tell you a lot about them. Learn their passions, interests, background, and aspirations. Doing so will allow you to converse more easily with them and their aides. It may also reduce your apprehension in reaching out to them.
2. Call or visit your representative's local office. Your first conversation might sound like the following:
 - Introduce yourself.
 - Ask if the aid has a few minutes to speak with you.
 - Let them know you are a resident of the school district and a constituent of the Senator or Assemblyman, and let them know you are concerned about the impact of the state budget on our schools.
 - Thank the aide for the work they do for the Assemblyman or Senator, and let them know you hope what you have to share with them will be helpful in assisting them to better represent his/her district.
 - Deliver your laser talk.
 - Ask if you can send additional information.
 - Let them know you will check back in a week to see how the elected official responded.
 - Thank them for their time.
3. Send a quick thank you note to the staff member letting them know you appreciated the time they took to listen to your concerns. This can be a card, note or e-mail. Again, remind them you will check back with them in a week.
4. If when you check back they tell you the Senator or Assemblyman will help, be sure to use good positive reinforcement. A little bit of chocolate, some homemade cookies, or even a nice thank you note will go a long way! They will remember your appreciation the next time you call them.

Get the attention of a good aide, and you've got the ear of the Senator or Assemblyman.

ACTION STEP #5

MEET WITH YOUR ASSEMBLYMAN OR SENATOR

If at all possible, meet with your Assemblyman or Senator. Each week during the budget season Albany has a "Tin Cup Tuesday." That is the day our elected officials set aside in the Albany offices for lobbying groups and interested taxpayers to make their case. Here are the easy steps to an effective visit to Albany:

- Schedule a meeting
- Prepare for the meeting
- Participate in the meeting
- Follow up.

SCHEDULE A MEETING

1. Plan what you are going to say when you call the Albany Office. Having a script or outline is always helpful and will make you feel more comfortable. Here is an example of a possible script:
 - Hello, my name is _____.
 - I am a (parent, resident, teacher, etc) in the *(Your School District Name)*.
 - I would like to meet with Senator/Assemblyman _____ to discuss the elimination of the Gap Elimination Adjustment or mandate relief or.....
 - Is there a time that we might be able to meet? Or, I plan to be in Albany on _____, would it be possible to meet sometime that day?
2. Call your Assemblyman or Senator's office. The phone numbers are included in this tool kit.
3. Ask to speak with the person who manages the calendar. If that person is unavailable or tells you they will have to get back to you, call back the next day. **Keep calling until you get your meeting scheduled.**
4. When you speak to the person who handles the Assemblyman's or Senator's calendar, ask to have a face-to-face meeting with your elected representative. Follow the bulleted information contained in section number ONE (1) above.
5. Thank the staff member for scheduling the meeting and let him or her know you will confirm the meeting by phone a few days prior to the meeting. Congratulations! Sometimes getting the meeting is the hardest part of the process.

PREPARE FOR THE MEETING

Prior to the meeting, there are several things you can do to ensure that your meeting goes smoothly:

1. A few days prior to your trip to Albany, you should call the office to confirm your meeting.
2. Create an agenda for the meeting. Regardless of whether you are going alone or with a group, you should plan out what is going to be said, by whom, and in what order. The agenda is just for you and your team, if others are going with you. It is not to be distributed to the office staff or left with the representative. Remember, this is *your* meeting. You want to control it and be sure that your messages are conveyed.

Your meeting should generally follow this format:

Introductions and Acknowledgements

- ✓ Each participant says who they are and what they do in the community (parent, resident, student, teacher, etc.)
- ✓ Acknowledge the public service of the representative and past actions on behalf of our school district.
- ✓ Let them know why you are in Albany and the issue you plan to discuss.

Laser Talk

- ✓ State the **Problem**
- ✓ Provide the **Solution**
- ✓ Call for **Action**

Closing

- ✓ Answer any questions
- ✓ Set a specific timeline for follow up
- ✓ Provide any "leave-behind" material
- ✓ Thank them for his/her time

If you are with a group of people, assign roles for the meeting. Choose a secretary and meeting manager.

- ❖ The secretary takes notes during the meeting and records any questions, objections, promises or concerns expressed by the elected official during the meeting. The secretary is also responsible for following up with a thank you note after the meeting.
- ❖ The meeting manager facilitates the conversation, provides the opening and closing statements and works to keep the conversation on task and focused.

If you are meeting alone, you obviously have to play both roles. If so, inspire yourself. Know that you may be making an incredible difference in the lives of children by holding this meeting.

THE MEETING

Here are a few points to consider as you prepare to meet with your Assemblyman or Senator, or their aide:

- ❑ Try to arrive a little bit early. The Legislative Office Building is quite large and it can be difficult to find your way if you are not familiar with it. Leave yourself enough time to find parking, go through security, and find your way to the office.
- ❑ Be concise. These folks will be working on a very tight schedule. You want them to remember every word you say. Stick to your message. If you have not been told how long the meeting will be, you can assume they have allocated 15 minutes for you. And, don't be surprised if your representative is late or can't attend due to pressing business in Albany. If so, meet with his or her aide and convey the same message.
- ❑ The offices are often small and crowded during visitation days. Be prepared to have to stand while waiting.
- ❑ Try your best to connect on a human level. A bit of humor goes a long way. Remember, on these days of visitation, everyone is making demands. Niceness goes a long way.
- ❑ Be passionate, not emotional. Emotional pleas make others in the room uncomfortable.
- ❑ Be prepared to summarize arguments to the issue. Be sure you understand their opposition, and have talking points prepared to combat them.
- ❑ Make the issue personal. Speak of children....your children, if applicable.
- ❑ Say "thank you." Surprisingly, our elected officials hear "thank you" less often than you would imagine. Be sure to thank the staff when leaving the office, too.

FOLLOWING UP

After the meeting, follow up with the person with whom you met. Your actions after the meeting demonstrate the importance of the topic to you and can keep the legislator's attention focused on the issue.

It would be good to send a note or e-mail after the visitation that reiterates your points, and your *call to action*.

This advocacy guide has been prepared for those interested in the future health of the (*Your School District Name*). We express our gratitude to Learning Forward, whose advocacy guide provided the foundation for this work.