

***Pennsylvania School Funding Campaign***  
*Successful Schools... Successful Children... Successful Communities*

800 North Third Street · Suite 408 · Harrisburg, PA 17102 · 717-260-9900 · [www.paschoolfunding.org](http://www.paschoolfunding.org)

Legislative Event Toolkit  
2009

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## Steps to Planning a Legislative Event

Hosting a legislative event is a strategic way to inform policymakers of the Pennsylvania School Funding Campaign, as well as gain media attention. It is important that legislators in their local districts understand how beneficial a quality public education is to children and families in your communities. The following are action steps to take to planning your event:

### Now

- Set the date, time and site for the event. Work with your legislator's aide to determine what days and times would be best. Pennsylvania's General Assembly is in session Monday through Wednesday, allowing most legislators time in their home districts on Thursday and Friday. Please see Appendix A for schedules of when the House and Senate are in session. The site for your event should be chosen based on its potential impact on the legislator and the media.
- Make sure there is ample parking and A/V equipment hook-up available at your site.
- Your events should be no longer than 90 minutes.
- Send invitations to legislators. Ideally, the legislator should receive a personal invitation from a key constituent – someone who has a personal connection to the legislator. Once the legislator is committed to the time and date, it should be communicated that this event will be canceled if they cannot attend on that date (unless you have more than one legislator committed).
- Also send invitations to local officials including school superintendents and principals, county commissioners, the chamber of commerce president, other business leaders, faith community leaders, and presidents of local civic groups.
- Secure caterer if holding an event that requires food/refreshments.
- Make every effort to involve every education and advocacy organization that has members in your legislator's district. This could include school district employees/officials, education organizations, community organizations and other endorsers of the campaign. Urge community non-profit organizations to invite their board members.
- When planning the agenda for your event, follow a schedule that would give parents, teachers, and other school officials opportunities to tell their stories about the benefits of adequate and equitable resources in schools. Make every effort to secure other speakers that demonstrate powerful community support for public education. Business and community leaders and local elected officials could be excellent choices to join school superintendents. Let us know if you need help reaching out to these groups – we can connect you with them through the Pennsylvania School Funding Campaign.
- Follow up the invitations with a personal phone call and a confirmation letter once confirmation is made. This should also be done for the local officials.
- Make copies of materials to distribute at the event.
- Create indoor and outdoor signs and banners for the event.

## One – Two Weeks Before the Event

- Develop talking points and/or scripts for the event and the order in which people will speak. You can use the sample talking points included in Appendix B. Include introductions for legislators. For biographical information about legislators, click on [www.state.pa.us](http://www.state.pa.us). Conduct a dry-run of the event with event coordinators.
- Draft a news advisory to announce the event and send it to your media list the week before the event. Refer to the news advisory template in this kit. All media invitations should be confirmed with phone calls a week prior to the event and then again the day prior to the event.
- Arrange for a photographer.
- Follow up with caterer to confirm food plans for event.
- Call legislators to confirm their attendance a few days before the event.
- Complete nametags for guests and speakers.
- Create a sign-in sheet.

## The Day of the Event

- Distribute the news release at the completion of the event. Fax or email it to those members of the press who did not attend.
- Place signage at all key intersections leading to the facility to ensure that everyone who is invited arrives AND to give all participants a sense of attending a very important event. Consider making colorful signs and banners to post around the outside of the facility and in the halls and the meeting room where the event will be held.
- Supply a sign-in sheet so these advocates can be mobilized for other grassroots lobbying activities. Nametags should be provided for all participants.
- Make sure host/co-host recognizes elected officials and staff as well as other dignitaries in the audience.

## Immediately After the Event

- Send personal thank you letters to all those who helped in the preparation for the event.
- Send thank you letters to all public officials and reiterate your key messages.
- Provide feedback to the Campaign to keep us informed of your reactions and comments from any legislators at your event. Include any tips or lessons learned for others planning legislative events.

## Other Ideas

- If your organization distributes a newsletter, write an article about the event and include photos. Send a copy of the newsletter to the legislator along with any photos they may be able to use in their own newsletters.
- Send a follow up news release with a photo of you and your legislator(s) to the local papers. Contact the Campaign at (717) 260-9900 for assistance, if necessary.

# Sample Event Invitation

(Date)

The Honorable John Doe  
Pennsylvania Senate  
Main Capitol  
Harrisburg, PA 17120

or

The Honorable Jane Doe  
PA House of Representatives  
Main Capitol  
Harrisburg, PA 17120

Dear (Representative Doe or Senator Doe):

On behalf of the (Event sponsor or name of local event planning committee), I am writing to invite you to attend our (Legislative Breakfast/Other Event) on (time and date). This will be an excellent opportunity for you to hear from the members of our community – your constituents – about funding for public education in the 2009-2010 state budget.

The Pennsylvania General Assembly took historic action in 2008 to enact the first fair and predictable school funding formula in almost two decades, and the availability of federal stimulus dollars makes it possible for the state to maintain its commitment to a fair and permanent school funding formula and fully fund it by 2013-2014.

We all know that successful schools are vital to the health of individuals and our communities, and in tough economic times there is no better investment than in the preparation of our future workforce. With the health of our schools, students and communities all relying on adequately funded and supported schools – everyone has a stake in ensuring successful schools exist throughout Pennsylvania.

At this event, you will have the chance to visit with parents, teachers, community leaders and other education advocates who make up the Pennsylvania School Funding Campaign and can share with you their experiences about the importance of successful schools to individuals and the community.

During this event, we also would welcome your thoughts on this issue.

I will follow up with a call to your office next week to learn of your availability. In the meantime, if you have any questions, please do not hesitate to contact me. Thank you for your consideration of this invitation.

Sincerely,

(name)  
(title)

## Sample Media Advisory



FOR IMMEDIATE RELEASE  
(Date)

For more information, contact:  
(Name/phone #)

(Event sponsor or name of local event planning committee) to Host (Name of Event) in Support of Public Education Funding Reform in Pa. and (this community).

Who: More than (\_\_\_) parents, teachers, community leaders and other education advocates who compose the Pennsylvania School Funding Campaign will meet with (State Representative/Senator) to show their support for public education funding in Pennsylvania. The (name of event) is being hosted by (insert host organization or committee name).

What: Advocates will discuss the importance of investing in education in tough economic times, discuss the use of federal stimulus dollars available for education, and voice their support for maintaining a commitment to the historic reforms to the state's outdated and broken school funding formula adopted in 2008.

When: (Date and time)

Where: (Place)

Why: The purpose of the event is to support a commitment to recent public education funding reforms in Pennsylvania, discuss how the Commonwealth should most effectively use federal stimulus dollars for education, and to emphasize the importance of investing in education in tough economic times.

Successful schools have an impact not only on students and individuals, but also on the viability of communities, regions and the Commonwealth as a whole. Educators and policymakers understand what schools need in order to be successful, but the missing piece is maintaining a commitment to Pennsylvania's new fair and predictable school funding formula and continuing to meet the state's adequacy funding targets.

The Pennsylvania School Funding Campaign is calling on Governor Rendell and the General Assembly to use \$418 million in federal stimulus dollars to increase funding for basic education over current levels in 2009-10.

###

## Sample Media Release

# *Pennsylvania School Funding Campaign*

*Successful Schools... Successful Children... Successful Communities*

800 North Third Street · Suite 408 · Harrisburg, PA 17102 · 717-260-9900 · [www.paschoolfunding.org](http://www.paschoolfunding.org)

FOR IMMEDIATE RELEASE  
(Date)

For more information, contact:  
(Name/phone #)

(Event sponsor or name of local event planning committee) Hosts (Name of Event)  
in Support of Maintaining a Commitment to Public Education Funding Reform for  
Pa. and (this community)

(City), Pa. – A broad-based coalition of parents, teachers, school officials, business and community leaders and other education advocates who comprise the Pennsylvania School Funding Campaign met with (State Representative/State Senator) today to express their disappointment with cuts to state funding for public education in the Senate budget. Representatives of the Campaign called on their elected officials to support using \$418 million in federal stimulus dollars in 2009-2010 to increase funding for basic education and maintain a commitment to fully implementing the new school funding formula adopted last year by 2013-2014. The (name of event) was hosted by the (insert host organization or committee name).

Advocates said that even in difficult economic times, our best investment to simulate the Commonwealth's economic growth is in today's young people in an attempt to let (State Representative/State Senator) know how important public education is to (his/her) constituents and the prosperity of the region.

"We all know that effective public schools are vital to the success of our young people, and also to the vitality of our communities," said (name of Executive Director of Board or other Committee official). "The Senate budget plan will stall progress on the adequate and equitable school funding formula adopted last year by the Pennsylvania General Assembly."

Nearly half of Pennsylvania's school districts have indicated their revenues are below budget and 60% have indicated they are already tapping into reserve funds to offset deficits this year, so the Senate budget would cause school districts to raise local property taxes or cut effective programs that help students learn - or both. This is unnecessary when federal stimulus funds can be used to support public schools and sustain progress on implementing the fair and predictable funding formula adopted last year.

"We appreciate the time that (State Representative/State Senator) spent today to meet with us to learn why so many of his/her constituents support using federal stimulus funds to increase support for public education," said \_\_\_\_\_. "We recognize the important steps that our lawmakers have taken thus far toward reforming public education funding and we look forward to taking the next steps to achieve healthy and successful public schools in every community in Pennsylvania."

For more information, please contact \_\_\_\_\_ at \_\_\_\_\_.

###

## Sample Event Agenda

Registration and Breakfast		8:30 AM
Welcome	Event Coordinator	9:00 AM
Overview	Team Head	9:05 AM
Statement by prominent/community leader		9:15 AM
Testimony from parents, teachers, etc.		9:30 AM
Legislator(s) Comments	Legislator(s)	9:45 AM
Q&A	Audience	10:00 AM
Close/Acknowledgements	Team Head	10:15 AM

## Sample Event Script

- Welcome everyone. Recognize legislators and thank them for attending your event.
- Provide an overview of the day's agenda. Give background and context about why the event is important.
  - An effective system of public education is essential for our students as well as the economic vitality of our communities and regions.
  - Parents, students, educators, community leaders and policy makers know what our schools need in order to be successful, but prior to 2008 the state lacked a sound system for providing the resources necessary to support the academic success of all students.
  - It is vital that the Pennsylvania General Assembly maintain its commitment to the fair and predictable school funding formula adopted last year. Federal economic stimulus dollars can keep the state on track with meeting its adequacy funding targets for fully implementing this new formula by 2013-2014.
  - The Pennsylvania School Funding Campaign is calling on Governor Rendell and the General Assembly to use \$418 million in federal stimulus funds to increase support for basic education beyond current levels.
- Allow a prominent community leader to provide a statement about why education is important in the business/economic development/workforce development/etc. fields and to the state's prosperity overall.
- Give parents, teachers, and students the opportunity to discuss what their schools need to be successful (books, computers, smaller classes, more qualified teachers, advanced classes, college prep, counselors, etc).
- Deliver the Ask: The Pennsylvania School Funding Campaign supports maintaining state funding for basic education at 2008-2009 levels and using \$418 million in federal economic stimulus funds to increase support for basic education beyond those levels.
- Allow legislators to comment about what efforts are currently happening in the General Assembly or in his/her districts.
- Take questions from the audience and facilitate the Q&A.
- Close the event by thanking participants and legislators for attending. Provide information for follow up or next steps.

# Sample Thank You Letter

(Date)

The Honorable John Doe  
Pennsylvania Senate  
Main Capitol  
Harrisburg, PA 17120

Or

The Honorable Jane Doe  
PA House of Representatives  
Main Capitol  
Harrisburg, PA 17120

Dear (Representative Doe or Senator Doe):

I want to express my sincere appreciation to you for attending the (name of event) earlier this week. It was a tremendous opportunity for us to familiarize you with efforts of the Pennsylvania School Funding Campaign and the importance of investing in public education in a tough economy.

I urge you to support maintaining state funding for basic education at current levels and using \$418 million in federal economic stimulus funds to increase funding for basic education in FY 2009-2010. This not only will allow the Commonwealth to stay on schedule with fully implementing the fair and predictable school funding formula adopted last year, but will reduce pressure on school districts to increase local property taxes and cut important programs for students.

I look forward to working with you in the future as we continue our efforts to ensure that every student in Pennsylvania has access to a high quality education. Please do not hesitate to call me if you have any questions or concerns relating public education funding in the Commonwealth.

Sincerely,

(name)  
(title)

## Tips for Talking with Your Legislator

Keeping in mind that your goal is to develop an ongoing personal relationship with your elected representatives, as well as to influence their position on specific issues or bills, here are a few things to remember when speaking to them:

- Know who your legislator is before making initial contact on an issue.
- Find out what legislative committees your legislator serves on.
- Do not be intimidated. Legislators will view you as the expert on the issue.
- Share your personal story if it helps to make your point.
- Do not assume that your legislator understands public education funding and the benefits to schools, students and communities. Take the time to educate him/her. Do not use jargon.
- Know your issue. Provide facts and figures to back up your position. Refer to the talking points and other materials located at [http://www.paschoolfunding.org/take\\_action\\_tools\\_talking\\_points.shtml](http://www.paschoolfunding.org/take_action_tools_talking_points.shtml).
- Remember all causes are good causes. You must convince your legislator that there is something extra special about yours.
- Don't debate with a legislator or give ultimatums such as "I won't vote for you if you do not support my position." Respect the legislator's right to disagree with you.
- Know your opposition. Be able to address the objectionable part(s) of the opposition stance directly and effectively, using verifiable examples and statistics.
- Put the legislator at ease by convincing him/her that you are there to serve as an educational resource. Act like a partner, not an adversary.
- Put broad policy issues in a local perspective. Legislators who know how issues will impact local voters tend to grasp ideas more easily and are generally more receptive.
- Be a good listener and hear out what your legislator has to say on the issue.
- Be sure to thank the legislator for taking the time to hear your position.
- Once a legislator gives you a commitment, it is all right to check back with him/her later. Do not badger him/her with phone calls.
- Do not be disappointed if your legislator sends an aide. Aides are critical to the process.
- Spend your time working with legislators who haven't made up their minds.
- Be brief, prepared, clear, honest, accurate, persuasive, timely, persistent, and grateful.
- Always follow up with a thank you note, and amplify your main points.
- When your legislator goes the extra mile, you may consider acknowledging his or her efforts by writing a letter to the editor in your local paper.

## Tips for Working with the Media

In many ways, the rules that apply to educating your legislator also apply to members of the media. In each case, it is easy to become unnecessarily intimidated, and you must remember that these "experts" need us to provide the information required for their job. Develop your media relations plan by focusing on establishing relationships and crafting a consistent message and repeating it in all your communications.

- Press releases should be brief, concise and contain name and phone number of a contact person. They should be written in the third person, using quotes if applicable.
- Wait one day and then follow up on your media advisory with a phone call. Be persistent but friendly.
- When speaking with the journalist, ask if this is a good time to talk. If not, schedule a time to call back.
- Keep in mind that many reporters do not arrive at work until 10:00 am. Also, do not call after 4:00 pm as most journalists are up against a deadline by this time.
- Be upbeat, energetic and excited about your event. State the reasons why you think the event is important to their readers and ask if the journalist has any questions.
- Be a good resource to reporters; develop personal rapport with members of the press.
- Include contact information on the media release of someone who is available after 5:00 pm and include a website address.
- If a reporter attends your event, provide him/her with the press release as well as any information that helps them tell the story about public education funding in Pennsylvania.
- Line up a spokesperson and individuals to be interviewed ahead of time.
- Don't be afraid to say you don't know or you aren't sure. Get back to the reporter with the requested information, if you don't have it.
- Greet the journalist when he or she arrives at the event.
- If you are expecting the television media to be present, remember to keep the event visual and think in terms of 7-8 second sound bites.
- Fax or email copies of the release to those members of the media who were unable to attend the event. Follow up with them and invite them to do a related story.
- Small dailies or weekly community newspapers are always looking for local news items. Be sure to send them your press releases. Get to know the editor of the local newspapers.

Appendix A

## 2009 Legislative Calendar

The **Pennsylvania House** plans to be in session on the following days:

January 6, 26, 27, 28

February 2, 3, 4, 9, 10, 11

March 9, 10, 11, 16, 17, 18, 23, 24, 25, 30, 31

April 1, 20, 21, 22, 27, 28, 29

May 4, 5, 6, 11, 12, 13

June 1, 2, 3, 8, 9, 10, 15, 16, 17, 22, 23, 24, 25, 26, 29, 30

The **Pennsylvania Senate** plans to be in session on the following days:

January 6, 20 (NV), 21 (NV), 26, 27, 28

February 2, 3, 4, 9, 10, 11

March 9, 10, 11, 16, 17, 18, 23, 24, 25, 30, 31

April 1, 20, 21, 22, 27, 28, 29

May 4, 5, 6, 11, 12, 13

June 1, 2, 3, 8, 9, 10, 15, 16, 17, 22, 23, 24, 25, 26, 29, 30

## Appendix B

### Pennsylvania School Funding Campaign Talking Points – April 2009

2008 was an historic year for public education in Pennsylvania, and as a result thousands of Pennsylvania's children are benefiting from programs aimed at increasing student achievement – the key to ensuring Pennsylvania's future economic success.

- Every school district that received a funding increase above the annual inflation index (4.4% for 2008-09) was required to spend that additional money on specific measures proven to increase student achievement. Statewide the numbers of students currently being helped by the new dollars invested this year is impressive:
  - 46,000 students receiving tutoring or other programs to extend classroom time.
  - 312,000 students in new courses such as foreign language and advanced math and having the most up-to-date curriculum and hands-on learning tools for science and other classes.
  - Nearly 2,000 additional children in pre-kindergarten or full-day kindergarten
  - 6,300 students in smaller classes.
  - Nearly 300,000 students benefiting from the additional professional development being provided to their teachers.

Pennsylvania must continue to keep moving forward on public education during these difficult economic times. There is no greater investment during an economic recession than in the preparation of the Commonwealth's future workforce, and this requires that school districts have adequate resources.

- By ensuring that our future workforce is adequately prepared to meet the challenges of a 21<sup>st</sup> century economy, we can help stimulate the economic growth of Pennsylvania in the years to come.
- Pennsylvania cannot postpone today's investments in public education because that will reduce our economic potential in the future. A sustained, multi-year commitment to improve the state resources available to school districts must therefore be a priority even in the most difficult economic times.
- In a recent op-ed (Delaware County Daily Times, December 27, 2008), the president of the Delaware County Chamber of Commerce wrote: "While I appreciate that the commonwealth is in tough economic times, we must look beyond the present and invest in the future of Pennsylvania's children by making basic education funding a top policy priority."

With the availability of \$1.6 billion in stimulus funds that can't be spent on anything but education, and states' basic education funding formulas in particular, the General Assembly now has the dollars required to meet statutory targets for basic education funding in the 2009-10 fiscal year.

- In total, the American Recovery and Reinvestment Act (ARRA) provides Pennsylvania and its school districts with \$2.6 billion in funds for public education over the next two years. Some of these dollars are through Title I, IDEA and Title II-D, and will flow directly to school districts. The remaining \$1.6 billion are provided in the State Fiscal Stabilization Fund to restore cuts to basic education and higher education and to meet funding requirements for basic education funding formulas.

- Over the next two years, the Governor has proposed to use over \$1.1 billion of the Stabilization Fund dollars for the basic education funding formula to meet funding targets. These funds will allow Pennsylvania to maintain its momentum to close school districts' funding adequacy gaps until state revenues recover from the recession.

Using \$418 million of the stimulus dollars in fiscal year 2009-10 to make the second year payment for the basic education formula is a responsible and reasonable use of stimulus dollars because:

- The federal law requires the funds be used for basic education.
- These dollars will ultimately be an investment in Pennsylvania's future and provide thousands of students with necessary educational resources.
- Stimulus dollars are intended to close gaps where the state and local governments don't have the revenue to meet needs and Pennsylvania doesn't have the revenue in 2009-10 to meet the funding targets for basic education.
- Allocating federal assistance for basic education now will help local school districts avoid tax increases to maintain the current level of educational programming for students.

The Commonwealth must make every effort to inform districts how much basic education funding they will receive in the coming weeks, so they can accurately build their budgets and avoid student program cuts and property tax increases.

- The uncertainty regarding how much money would be available for basic education in May and June of 2008 forced districts to build their budgets with extremely conservative assumptions of state support. This resulted in some districts approving property tax increases before June 30<sup>th</sup> and receiving higher than anticipated increases in basic education funding.
- School districts need to know that \$418 million will be available for basic education if they are to build responsible budgets, not only so they can keep valuable student achievement programs, but also so they can hold down property tax increases during this economic crisis for the benefit of local taxpayers.

The General Assembly made a commitment to school districts in the summer of 2008 to review and meet state funding targets by fiscal year 2013-14. Holding stimulus funds hostage that are required to be used for public education fails to uphold the promise made to Pennsylvania's students, parents and taxpayers.

With the infusion of stimulus dollars for basic education over the next two years to meet state funding targets, Pennsylvania must maintain its own investment of state contributions to the basic education subsidy at the 2008-09 level.

- Some contend that using the federal stimulus dollars for basic education over the next two years will require a very large increase in state funds when those federal funds are no longer available. Unless state revenues recovery quickly to meet such requirements, Pennsylvania will need to have a conversation about how to meet funding adequacy for school districts – but that was a conversation we were going to have at some point even if federal stimulus dollars weren't available.
- In these difficult economic times with reduced state revenues, numerous budget requirements and needs for vulnerable citizens, it is understandable that the Governor withdrew his request to set-aside \$300 million in state funds for basic education in order to free up dollars for other areas of the state budget. But with that said, reducing state support for basic education below the 2008-09 level will only make funding challenges more difficult in the future and jeopardize the maintenance of resources that foster student achievement.

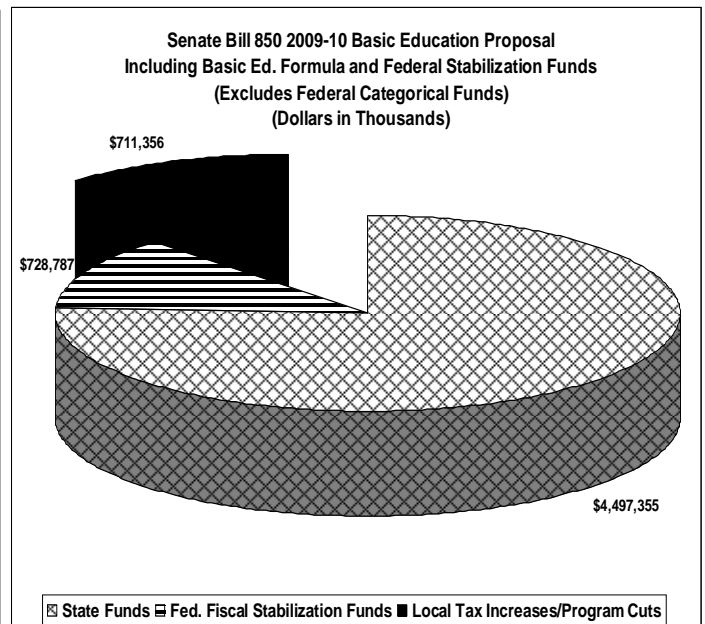
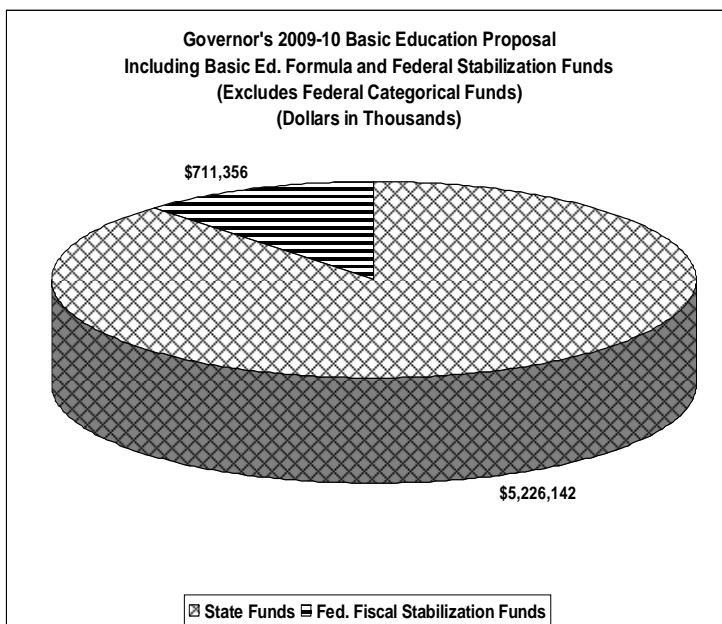
Policymakers must ensure that we do not make matters worse in two years by reducing the state investment in the basic education subsidy and replacing current

levels of state funds with stimulus dollars. Using state dollars dedicated for basic education to cover other spending priorities in the budget would force local school districts to once again pick up the cost to maintain support for student achievement through increased property taxes.

Advocates for basic education funding are open to discussions that will assure school districts and the Commonwealth a responsible transition when the stimulus funds expire. However, such discussions must begin with a commitment to maintain state basic education funding at the 2008-09 level and appropriate a \$418 million increase in basic education funding (using federal stimulus dollars), distributed to districts via the basic education funding formula proposed by the Governor.

## Pennsylvania School Funding Campaign Senate Bill 850 Funding for Basic Education Subsidies

- ❖ The Pennsylvania Senate passed a 2009-10 state budget bill on May 6 that would decimate the increased support for public education proposed by Governor Rendell for the next school year. Senate Bill 850 was introduced by Senate Republicans on May 4 and approved along party lines two days later.
- ❖ Senate Bill 850 would provide school districts \$711.4 million (or 12 percent) less than the Governor's proposal. Every school district in the state would receive less.
- ❖ The Senate budget reduces state dollars for public education (for the first time), diverts those state education dollars to other purposes, and uses federal stimulus funds to fill the hole caused by the cut. All of this will flat fund basic education at 2008-09 levels.
- ❖ Nearly half of Pennsylvania's school districts have indicated their revenues are below budget and 60% already are tapping into reserve funds to offset deficits this year, so the Senate budget cut of \$711.4 million from the Governor's proposal would cause school districts to raise local property taxes or cut effective programs that help students learn – or both.
- ❖ This is unnecessary when federal stimulus funds can be used to support public schools and sustain progress on implementing the fair and predictable funding formula adopted last year.
- ❖ As the state budget process proceeds in the coming weeks, the General Assembly should restore the state and federal funding for basic education requested by the Governor for 2009-10 in order to avoid unnecessarily large local property tax increases.



*(Both charts include state funds and federal Fiscal Stabilization Funds dedicated to the Basic Education Subsidy formula, as well as federal Fiscal Stabilization Funds for one-year grants to school districts. Both charts exclude the Accountability Block Grant (ABG) and Education Assistance Program (EAP) (tutoring) funds. Both charts also exclude federal stimulus money for categorical programs such as special education and Title I, which are the same amounts in both the Governor's proposal and Senate Bill 850.)*

For more information or assistance in  
planning your event, please contact:

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