



*Winning at the local level...*

# **A School Board Election and Campaign Handbook**



Prepared by the IEA-NEA Government Relations  
& Communications Departments

Revised 4/04

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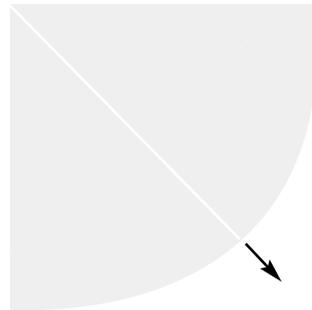
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## Introduction

School board elections are important to you and your members. **Get involved early.** Your association's action could make the difference in who's elected, your contract, and the quality of education in your district.

The following will help to define your association's school board election objectives, recruit or choose candidates who support your issues, create an effective organization that can inform and register your voters, and get these voters to the polls on Election Day. If you have followed these steps, you have an excellent chance of receiving more votes than your opponent(s) on Election Day and changing the course of education in your community.



# Republican Party

## *County chairperson*

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Business name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_

Other party/official information \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Democratic Party

## *County chairperson*

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Business name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

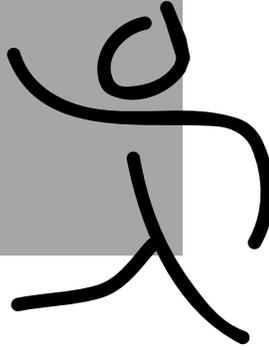
Phone \_\_\_\_\_

Other party/official information \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Getting Started



**M**uch of this booklet is devoted to the “external” campaign, meaning the effort to influence people outside your association who are eligible to vote on Election Day. But you should not neglect the “internal” campaign, making sure that your own association members are well informed, registered to vote, and motivated to go to the polls on Election Day. School board races are often decided by fewer than a dozen votes — and sometimes just one vote. By motivating your own members and getting them to the polls, you could determine the winner in a local race.

**Recommendations.** While this process is usually open to all association members, few actually participate. It is important that all members be notified immediately after the recommendation of your choice and be advised of your reasons for supporting the candidate or opposing others. This could be done through your association newsletter, at an association meeting, or PAC meeting.

**Identify Members’ Home Districts and Get Them Registered.** Not every association member will live in the targeted school board zone, so you must determine which ones do and concentrate your energies on these. The members themselves may be unaware of this, so it is up to you to inform them of their district and the association’s recommended candidates. Make sure every member is registered, because it makes no difference if they support your candidate, if they can’t vote on Election Day.

**Survey Your Members.** Get an idea of how motivated your association members are

in this election, whether they support your recommended candidates, and why. This will help determine where to start in voter identification and get-out-the-vote efforts. Some heavy selling to your own membership may be necessary, talking to each person individually about the reasons for the association’s choices.

**Lobby Your Own Members for Their Votes.** Don’t take your own members’ votes for granted.

You need to work just as hard at convincing them as you do any voters. A visit from the campaign organizers or the association president can be very helpful. The association newsletter should also help motivate undecided members.

**Get Campaign Work Commitments from Members.** Your association’s strength is primarily in its skills and in its numbers. Make sure you ask your membership to volunteer for preparing and distributing fliers and mailings, raising money, calling voters, hosting coffees, doing door-to-door canvassing, or whatever other work is important to your campaign.

**Raise Money from Your Membership.** This could be as little as \$5-\$10 per person, but it could make the difference in the outcome, particularly in school board races. You could charge admission to a casual dinner, hold a raffle, or have another event that would make giving money to your candidate or PAC more interesting to your members. Keep records of who gives money, and go to those members first in your next election. Thank them in writing.

**Get Your Members Out to Vote!** Send reminder notes in members’ mailboxes the day before the election and on Election Day. Make calls on Election Day to ensure they’ve voted, encourage them to vote before they go to school, and offer rides or baby-sitting help for those who have difficulty getting away from their homes to go vote.

# How Are We Doing?

## Assessing Your Association's Political Action Capabilities

Complete a preliminary check of your association's activities, skills, and knowledge to give you an idea of where you need to put your time and resources.

Use the following checklist to analyze the activities that indicate your local association's involvement in past school board elections.

---

### Getting Organized

Does your association:

- Currently have an active IPACE committee of five to eight members?  YES  NO
- Have a separate IPACE checking account?  YES  NO
- Annually request its 20 percent rebate from the state IPACE committee?  YES  NO
- Have a bulk-rate mailing permit that can be used?  YES  NO

---

### Collecting Data

Does your association:

- Have the names, addresses, and phone numbers of all school employees in the district?  YES  NO
- Have the names, addresses, and phone numbers of all IEA members who live, but do not work, in the district?  YES  NO
- Have mailing labels for the individuals above?  YES  NO
- Know which of the above individuals are *not* registered voters?  YES  NO
- Possess a complete set of registered-voter lists by precinct?  YES  NO
- Know the precinct in which each school employee resides?  YES  NO
- Know which employees did or did not vote in the last school board election?  YES  NO
- Have a file with the statistics of the last five school board elections?  YES  NO

## Getting to Know the District

Has your association:

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| → Analyzed the political habits of the community in regard to school board elections? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Monitored school board meetings at least once a year prior to the election?         | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Analyzed the incumbent school board?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Analyzed the district's grade card?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
- 

## Selecting a Candidate

Has your association:

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| → Developed and utilized a questionnaire for candidate interviews? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Conducted a search for potential school board candidates?        | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Interviewed school board candidates and potential candidates?    | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Generated school board candidates?                               | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Recommended a school board candidate?                            | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
- 

## Starting a Campaign

Does your association:

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| → Notify all school employees of recommendations?                                | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Make association recommendation(s) public?                                     | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Circulate nominating petitions for candidates?                                 | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Contribute money to recommended school board candidates?                       | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Research campaign issues?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Develop campaign issues by talking with non-school employees in the community? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Form alliances with other groups in the community?                             | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Organize a citizens' committee to support the campaign?                        | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

## Organizing the Association

Does your association:

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| → Register unregistered school employees?                       | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Ask all school employees personally to serve in the campaign? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Include political action on each association meeting agenda?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
- 

## Contacting Voters

Does your association:

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| → Target key precincts or areas for election efforts?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Systematically recruit volunteers among non-bargaining-unit members?                            | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Train campaign volunteers?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Develop adequate materials for volunteers?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Prepare the candidate for campaigning (regarding issues, organization, and his/her role, etc.)? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Identify favorable voters through phone canvass?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Identify favorable voters through door-to-door canvass?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Organize a mail campaign?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Conduct a series of coffees for candidates?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Design and/or print campaign literature?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Use lawn signs to promote your candidate?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Distribute sample ballots at polls?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Conduct Election Day “get-out-the-vote” drives (i.e., phone or door-to-door canvass)?           | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Train and utilize poll watchers?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

## Election Day

Does your association:

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| → Hold a post-election party (win or lose) and thank all volunteers? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Keep accurate records on volunteers and activities?                | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Conduct a post-election analysis of the campaign?                  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
- 

## Lobbying

Does your association:

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| → Analyze the voting behavior of the incumbent school board and local legislators?               | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Identify your local's five key issues for the coming year?                                     | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Meet, at least monthly, with school board members and occasionally with legislators?           | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Meet with "targeted" board members prior to each school board meeting?                         | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Thank board members and legislators who support your positions?                                | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Keep a record of key school board votes and get vote summaries from the IEA-IPACE consultants? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Attend all board meetings?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Invite board members and legislators on school tours?  | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| → Invite board members and legislators to IEA-IPACE workshops?                                   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

# You Can Do It!

**D**on't be concerned if your association didn't score high on the assessment. Do be concerned, however, if you had almost 100 percent in the **NO** category.

## Starting Out or Starting Over

Here are the minimum actions and activities your association must be able to accomplish in order to start an effective school board or local political action effort. Be assured, however, that these are minimums. Eventually, you must be able to accomplish virtually all the actions and activities cited in the previous assessment section if you are truly going to be an effective political action force at the local level.

### The Minimums

- An IPACE committee of 5-8 members.
- Names, addresses, phone numbers, and e-mail addresses of all your members.
- Regular association monitoring of school board meetings.
- A candidate questionnaire.
- An effective, internal, every-member communications system not connected to school mail.

## Getting A Handle on the Situation

### Assessing the Current School Board

In order to change the current makeup of your school board, you must find candidates who have your interests in mind or discover and recruit such candidates on your own. You must also assess their knowledge and viability as a candidate, since even the most sincere and honest individual may not have the time or skills to do what it takes to win a contested school board election.

As a first step, conduct a thorough assessment of the present board members, determining their strengths and weaknesses on your issues and their potential for growth. Your IPACE and executive committee should do this assessment. The following can help you make these determinations:

1. Characterize the composition of your school board with respect to the following: sex, age, occupation, political affiliation, and geographical distribution.
2. Does your school board appear to be reflective of the community with regard to the above factors?
3. What type of school board candidate would bring about a balance on the board?
4. How many seats are up for election this time?
5. How many incumbents will seek re-election?
6. How many votes will it take to win?
7. How many Association members and spouses are eligible to vote?
8. How many polling places are there in your school district?



# Building a School Board Member's Profile

Whether a school board candidate is a friend or foe of your interests, you need to be well informed of their background, their voting behavior, and their public positions on key issues. The following form will help you put together a thorough file on all candidates and incumbent board members. This should be updated annually.

**Name** \_\_\_\_\_

District \_\_\_\_\_ County \_\_\_\_\_ IEA Region \_\_\_\_\_

## **Personal Data**

Address \_\_\_\_\_

Phone \_\_\_\_\_ Age \_\_\_\_\_ Marital status \_\_\_\_\_

Spouse's name \_\_\_\_\_

Spouse's occupation \_\_\_\_\_

## **Education**

Elementary school \_\_\_\_\_

Junior high school \_\_\_\_\_

High school \_\_\_\_\_

College/university \_\_\_\_\_

Degree earned/major \_\_\_\_\_

## **Spouse**

Elementary school \_\_\_\_\_

Junior high school \_\_\_\_\_

High school \_\_\_\_\_

College/university \_\_\_\_\_

Degree earned/major \_\_\_\_\_

**Children**

- 1. Name \_\_\_\_\_ Age\_\_\_\_ School\_\_\_\_\_   
Teacher last year\_\_\_\_\_ Teacher this year\_\_\_\_\_
- 2. Name \_\_\_\_\_ Age\_\_\_\_ School\_\_\_\_\_   
Teacher last year\_\_\_\_\_ Teacher this year\_\_\_\_\_
- 3. Name \_\_\_\_\_ Age\_\_\_\_ School\_\_\_\_\_   
Teacher last year\_\_\_\_\_ Teacher this year\_\_\_\_\_
- 4. Name \_\_\_\_\_ Age\_\_\_\_ School\_\_\_\_\_   
Teacher last year\_\_\_\_\_ Teacher this year \_\_\_\_\_

**Employment**

Company\_\_\_\_\_ Business phone\_\_\_\_\_   
Address \_\_\_\_\_

\_\_\_\_\_   
General product or service \_\_\_\_\_

Position held \_\_\_\_\_

Immediate supervisor \_\_\_\_\_

Company president \_\_\_\_\_

Years with company \_\_\_\_\_

General responsibilities \_\_\_\_\_

Unions in company \_\_\_\_\_ Union member\_\_\_\_\_

Union name \_\_\_\_\_

**Spouse**

Company\_\_\_\_\_ Business phone\_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_   
General product or service \_\_\_\_\_

Position held \_\_\_\_\_

Immediate supervisor \_\_\_\_\_

Company president \_\_\_\_\_

Years with company \_\_\_\_\_

General responsibilities \_\_\_\_\_

Unions in company \_\_\_\_\_ Union member \_\_\_\_\_

Union name \_\_\_\_\_

**Community Activity**

School board:

Date elected \_\_\_\_\_ Term ends \_\_\_\_\_

Political affiliation:

Party \_\_\_\_\_ Active \_\_\_\_\_

Church affiliation:

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_ Pastor \_\_\_\_\_

Involvement (committees, usher, etc.) \_\_\_\_\_

**Community Organizations**

Name	Position	Leader
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Other Information**

Where does he/she bank? \_\_\_\_\_

Estimated value of home \_\_\_\_\_

Other investments \_\_\_\_\_

Hobbies/personal interests of candidate and family members:

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---

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Where does the candidate's money come from?

Earned \_\_\_\_\_ Spouse \_\_\_\_\_ Other \_\_\_\_\_

Inherited \_\_\_\_\_ Investments \_\_\_\_\_

Information on any community, political, or other person/organization who may have particular influence with this candidate (names, addresses, telephone numbers, other information): \_\_\_\_\_

---

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Is this candidate pro-teacher/education? \_\_\_\_\_

---

Does candidate or his/her spouse have political ambitions? \_\_\_\_\_

If so, what are they? \_\_\_\_\_

What are common personality traits known about the candidate? \_\_\_\_\_

---

What is the public perception of the candidate? \_\_\_\_\_

---

What are private observations of the candidate? \_\_\_\_\_

---

How is the health of the candidate and his/her family? \_\_\_\_\_

---

Who is the family physician? \_\_\_\_\_

Who in the administration has the most influence over the candidate?

---

# Recruiting New School Board Candidates

If you're not happy with the current school board members, you will need to find some fresh faces with different skills and attitudes who can work as your allies in your efforts to improve the education of the district's children. Maybe you have some candidates in mind who can do the job. Don't overlook some talented individuals outside of your social and professional circles. Think broadly.

Candidates for school board must be at least 18 years of age, a U.S. citizen, a resident and registered voter in the state and district for at least one year preceding Election Day, and

must not already be a school trustee or school treasurer.

The following are some assessment tools to help you find and recruit good candidates in your community.

## Where to Look for Candidates and Allies

Compile the following information to indicate possible community groups, unions, school groups, etc. that may be sources for candidates and allies in a school board election. Meeting dates and contact names are of particular importance. Included in the listing should be civic, fraternal, nationality, minority, and women's organizations. The listing should also include informal gatherings if possible — bowling leagues, bridge clubs, etc. The most important aspects for Election Day are the membership lists for each group with addresses and phone numbers. Check to see that all are registered to vote, and then organize for Election Day. Because this is so politically important, **do not share your membership list.**

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## Community Organizations

Name of Organization (Rotary Club, etc.)	Members & Registered Voter's Name & Phone	Approximate Membership	Meeting Schedule	Publication?	
				Yes	No

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## Unions in the District (or Surrounding Area)

Name of Union	President's Name & Phone	Approximate Membership	Meeting Schedule	Publication?	
				Yes	No

## Educational Supporters

Almost every community has a number of parent activists involved in education. From PTA presidents to chairpersons of bond referendum drives, these individuals have a big stake in education. They can be very useful in helping you find and recruit quality board candidates.

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## Parent Teacher Associations (PTAs or PTOs)

School	President	Phone	Attitude with respect to negotiations	Contact
--------	-----------	-------	---------------------------------------	---------

**Other Community-School Organizations**

President of the Parental Band Supporters Club

Name \_\_\_\_\_ Phone \_\_\_\_\_

President of the Local Athletic Boosters Club

Name \_\_\_\_\_ Phone \_\_\_\_\_

Steering Committee of Most Recent Bond Election

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Others \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Political Information**

***City Leaders***

Title	Name	Home Address	Phone	Business Name	Business Address	Business Phone

***Council Members/Trustees***

Title	Name	Home Address	Phone	Business Name	Business Address	Business Phone

**Regional School Superintendent**

Title	Name	Home Address	Phone	Business Name	Business Address	Business Phone

**Other County Officials**

Title	Name	Home Address	Phone	Business Name	Business Address	Business Phone

**State Legislators**

State Representatives

Name	Political Party	Home Address	Home Phone	Business Address	IPACE Recommended? Yes/No

State Senators

Name	Political Party	Home Address	Home Phone	Business Address	IPACE Recommended? Yes/No

# General Questions to Help in Your Selection Process

1. Who in the IEA local association has any influence on board members or even knows them?
2. Who are board members' best friends who can influence?

## Screening Candidates

You are searching for someone you can turn into a candidate. From this point on, however, assume there are other announced candidates, that you might not find a candidate, and may have to embrace an acceptable candidate you did not recruit.

You are now ready to formally screen all of the recruited and announced candidates. This will lead to a local association recommendation and support for a candidate.

### The Candidate Questionnaire

The local Political Action Committee for Education is in charge of interviewing and recommending candidates. The members should design and mail a questionnaire with a cover letter to all candidates well ahead of the petition filing deadline. The entire recommendation process must be completed before the legal deadline for candidates to file for office.

### Candidate Interviews

If they fail to return the questionnaire at the specified time, some candidates may need to be called. *If they refuse to answer, do not interview them.*

Following are suggestions and guidelines for conducting interviews:

#### Preliminary

- Keep your interviewing committee small (ideally four or five persons).
- Make the candidate comfortable.
- Hold training meetings for interviewers. Go over the procedures and the do's and don'ts

of interviewing. Assign the jobs of *leader*, *reporter*, and *expediter*.

### The Interview

- Three members of the interviewing team each have a specific function:
- The *leader* is the person who sets the tone of the interview. She/he establishes rapport with the candidate, is friendly and courteous, and never shows hostility, even to an obviously unsuitable candidate. The *leader* discusses the questions, sometimes interpreting if necessary.
- The *reporter* is a listener. After she/he says "how-do-you-do," the *reporter* keeps in the background. The *reporter* concentrates on being perceptive and tries to remember as much as possible. *It is recommended that she/he not take notes during the interview, because a flying pencil often inhibits free discussion.* The *reporter* not only listens to what is being said in words, she/he also looks for the unsaid. For example, whenever teachers' salaries are mentioned, the candidate re-lights his pipe. Could this indicate an attitude? Watch body language during the interview.
- The *expediter* has either a big job or a small one depending upon how the conversation is going. If the interview seems off on a tangent, she/he can courteously interrupt with phrases like, "You said a moment ago that..." or "Did you mean..." The *expediter* keeps the interview moving and could signal its change of pace or termination. Warning: she/he does not stifle a discussion that is providing some insight, even though the discussion is off the track. The *expediter* does keep the conversation from meandering fruitlessly.

### Some Don'ts for Successful Interviewing:

- Don't argue with the candidate.
- Don't prolong the interview.
- Don't do all the talking (you are seeking information, not trying to teach).
- Don't let the candidate interview *you*.
- Don't attempt to exact rash promises. Focus the person being interviewed on salient points.
- Don't commit yourself at this time.

## Evaluation of Candidates

Every candidate you interview should be evaluated. This should be done as soon as possible after the interview. You will want to compare each candidate on the basis of legal and political qualifications.

The final decision of which, if any, candidate to support, may be made on the basis of many individual considerations. Some of those considerations will remain subjective, “gut reaction” responses, but most can be reduced to an orderly list of questions and answers obtained from a variety of sources.

Some answers may be obtained from the candidates themselves by interview, by questionnaire, or by consulting their speeches, position statements, and biographies. Other sources will tell you what others have said about the candidate, such as media coverage, party records and evaluations, and oral and written comments by community leaders.

Begin by considering the following very general questions that lead to the final “yes” or “no” decision. You will want to come back to them and argue them out after you have gotten all the answers you can to the detailed questions.

- Can the candidate win?
- Will the candidate win without our help?
- Will the candidate be an effective board member?
- Will the candidate listen to our local education association supporters during the campaign? After the campaign?
- Is this candidate the best choice among those running?
- Should we support this candidate: Yes or No?

## Guideline Questions for Evaluating Candidates

The following questions constitute a set of guidelines that you can adapt as you draw up your own questionnaire and interview outline. Not all of the questions will apply to any one situation. Also, other questions will occur to you about local issues. However, if you have considered these, you will not be likely to overlook significant factors in arriving at your final evaluation.

## Personal Characteristics

- Does the candidate think independently and objectively about problems?
- Will the candidate give the necessary time to the position if elected?
- Does the candidate demonstrate respect for the opinions of others and for the dignity of each individual?
- Is the candidate motivated by more than a quest for personal prestige or political gain?
- Will the candidate work cooperatively with other board members, even when their opinions differ?
- Does the candidate possess the leadership skills to influence public opinion on behalf of positive programs to improve the educational process?
- Does the candidate have the courage and ability to explain and support an unpopular policy?
- Does the candidate demonstrate the ability to acknowledge errors and change his or her mind without fear of appearing weak or losing stature?
- Does the candidate withhold judgment on critical issues until he or she has all available information?
- Is the candidate free of personal or economic interests that would conflict with his or her ability to serve?
- Does the candidate have a sense of humor?
- Can the candidate project an image that could serve as a unifying force in controversial situations?

## Record of Public and Community Service

- Is the candidate familiar with the social, political, ethnic, economic composition, and resources of the district?
- Does the candidate have sufficient background and/or practical experience to relate the school curriculum to the educational needs, resources, and aspirations of the whole community?
- Is the candidate recognized as a leader in his or her own profession?

### **Understanding the Components of Quality Education**

- Does the candidate have a strong commitment to the need for public education in a democratic society?
- Does the candidate understand the cross section of thinking about basic concepts of public education?
- Does the candidate seek and value the knowledge and opinions of specialists?
- Does the candidate support equitable and sufficient school funding essential to quality education?
- Will the candidate seek, listen, and respond to employee opinion on education issues?
- Does the candidate recognize the relationship of physical facilities to the effectiveness of the education process?

### **Understanding the Collective Bargaining Process and Employee Rights**

- Does the candidate understand the collective bargaining process and support the right of employees to bargain collectively?
- Does the candidate understand the standards of employment and working conditions necessary to promote the highest quality education?
- Does the candidate understand “due process” concerns of education employees?
- Does he or she understand the importance of seniority in the dismissal process?
- Will the candidate support employee participation in the educational decision-making process?

### **Effectiveness of Campaign Effort**

- Is the candidate an attractive political personality?
- Can association members ally comfortably with other groups working in support of this candidate?
- Can the candidate communicate his or her ideas effectively?
- Is the candidate likely to attract additional support from multiple voter groups or from his or her political party?
- Does the candidate have the personality characteristics to withstand the stress of a contested election?

- Does the candidate demonstrate a working knowledge of campaign techniques?
- To what extent will education employees become involved in his or her election?
- Can the candidate attract sufficient financial support for a successful campaign?

### **Sample Questions for School Board Candidates**

- Why are you running for the board?
- Describe your campaign plans and support.
- What special strengths do you believe you would bring to the school board?
- What responsibility does the district have to the special student?
- What responsibility does the district have to the minority student?
- Define the job of an administrator.
- Define the job of a teacher.
- Define the role of the ESP.
- How should the district budget be developed?
- How should it be administered?
- Define in your own words a basic education program.
- How should curriculum be developed?
- What do you think class size limits should be?
- What do you think the federal role in education should be?
- What do you think the state role in education should be?
- What do you think the local role in education should be?
- Sometimes the school board has issues come before it in which parents and school employees are at odds. What will you do?
- Describe your policy on student discipline.
- How should the district ensure parental input?
- What will you do when there is a dispute between a school employee, a group of school employees, and their administrator?
- What is your understanding of due process rights for school employees?
- Do you have a position on employee seniority rights?

- Do you have a position on affirmative action?
- There has been a movement in the U.S. in which movies, textbooks, and library books have been censored. What is your opinion of this?
- Do you have a position on separation of church and state?
- Do you have a position on sex education?
- What should be the role of the public schools with regard to educating students about AIDS?
- Do you belong to any group(s) currently attempting to restrict science teaching or open-ended questions for class discussions?
- How should controversial issues be treated in the classroom?
- What do you think of merit pay?
- What do you feel is the role of the association in education?
- What do you see as the most pressing problem in our district?
- Why are you seeking a recommendation from our association?
- What is your understanding of the collective bargaining process?
- What do you see as the school board member's role and responsibility in the effective administration of schools?

### **Local PACE Recommendation**

After you have compared the candidates, you are ready to recommend. If you have recruited a candidate and she/he appears to be the person you need, then you will have less trouble coming to an agreement. If there is no clear-cut choice, go back and compare them again on the basis of those all-important political factors like support for education employees, ability to win, experience in public affairs, reputation in the community, where she/he lives, degree of commitment to campaigning, and others.

Once the local PACE committee has decided on a candidate to support, follow through immediately by notifying the candidate and the association members.

The decision whether to make the recommendation public or not is one that should be made in consultation with the candidate. Do not fall prey to the old (and false) myth that "the union's recommendation is the kiss of

death." Timing, however, is important. *If you decide to recommend publicly, the week before Election Day is the best time.*

## **Creating A Campaign Organization**

Once you have chosen a candidate, you have the arduous tasks ahead of you of finding a compelling reason for voters to choose your candidate, getting those voters registered, and getting those voters to the polls on Election Day. This takes a tremendous amount of work and planning, and you have to be organized to do it effectively. The following is a step-by-step plan to get you organized so that you can achieve your goal of having more votes than your opponent(s) on Election Day.

### **Initial Organizational Meeting**

The initial organizational meeting should include the president of your local association, several active association members, two or three members of the community who have consistently supported school education efforts and support your candidate, and the candidate's strongest supporters. At this meeting, you should discuss the following items:

### **Campaign Committee**

Develop a list of individuals who may be willing to help in your effort. Include professionals, local business persons, labor activists, church leaders, or other men and women who have held leadership positions in the community or who may have a special interest in the campaign. Who might help with resources such as office space, phones, and financial support?

### **Leaders and Responsibilities**

It is important that you soon appoint leaders for this effort, perhaps during this first crucial meeting. Assign tasks to various people at the meeting, and designate some that will help recruit more people to help. You will need to select a campaign manager, treasurer and/or fundraiser, communications chair and spokesperson, research director, volunteer coordinator, etc.

### **Campaign Strategy**

You should begin forming a strategy for your effort. This should include:

- Determining the number of votes needed to win the election.

- Adopting a budget for reaching voters and getting them to the polls.
- Organizing a fundraising drive to finance the effort.
- Educating voters with events and activities such as town meetings, press conferences, sign distribution, direct mail, or phone campaigns.
- Get-out-the-vote efforts that ensure your voters are at the polls when it counts — on Election Day.

### **Timeline**

Adopt a timeline for all of these events and tasks and discuss how many volunteers and what resources are needed at each step of the process.

### **Message Development**

Perhaps most important for the committee is its effort to formulate a common message that will be directed at the community. What are the handful of facts about your district and your candidate that you want every voter to know by Election Day? What will your slogans be?

### **Fundraising**

Fundraising should begin immediately after your candidate has made the decision to run and particularly after he/she has been recommended by your local association. Contributors are often curious about what you will do with the money, so have your proposed budget ready to show them when they ask. The earlier you begin, the more contacts you make with potential supporters, and the greater chance you have of beating your opponent(s) to important sources of financial and political support.

Put together a fundraising committee that includes people with good interpersonal skills and contacts with potential contributors. Personal contacts are often the easiest to parlay into financial contributions. The committee's objective is to network with these initial contacts until the group has compiled several lists of individuals and organizations that are the most likely contributors. Contact these people in a personal way with a phone call or a nice, personalized note, if possible, and follow-up.

Don't be discouraged by rejections. If one in ten contacts turns up a \$50 contribution, many people consider that a tremendous success, particularly early on in a campaign.

The first fundraising contacts should be made with organizations that are likely to make large contributions quickly. These would include your association PAC, local labor groups, and professional associations. Other potential contributors include local businesses and professional people, especially those that do business with the school district, and individuals with strong views about education. These could include transportation companies, insurance agents, book suppliers, janitorial supply houses, athletic equipment suppliers, building trades contractors, doctors, lawyers, architects, local small businesspeople, and others who feel strongly about education.

While big fundraising events like dinners, dances, and other entertainment-oriented events are fun, they require a great amount of preparation and sometimes raise minimal cash. They are good, however, for spirit and morale among your volunteers and supporters and can get you some good media exposure.

### **Legal Requirements for Fundraising Expenditures**

If your group raises or spends more than \$3,000 in a 12-month period, you must file as a political committee with the Illinois State Board of Elections, reporting the source of your funds and the destination of your expenditures. Every committee must designate a treasurer and a chairperson. One person, even the candidate, can hold both offices for the committee. The political committee can make no expenditures or receive any contributions while there is a vacancy in the treasurer's position with the committee. Because this position is so critical, you should appoint someone who is very reliable and knows financing well to do this work.

If you expect to exceed the \$3,000 threshold, it is important that you immediately get information about election laws from the State Board of Elections by calling or writing their office for advice. Many of their pamphlets are written in lay language and aren't necessarily designed for the campaign professional. You can

get these documents from the Springfield office at: Illinois State Board of Elections, 1020 South Spring Street, P.O. Box 4187, Springfield, IL 62708, (217) 782-4141. In Chicago, the address is: Illinois State Board of Elections, James R. Thompson Center, Suite 14-100, Chicago, IL 60601, (312) 814-6440.

### **Gathering Election Statistics**

Before you create a budget for the campaign, you need to determine the number of votes needed to win and how you intend to reach them. These facts will help you decide how much money you'll need to win the election. If in the past ten school board elections it has taken no more than 2,000 votes for any candidate to win, that is your minimum target.

These statistics will help you answer questions such as:

- How much would it cost to send each person in the high-percentage, pro-education precincts one piece of mail?
- What about five pieces of mail?
- How much does it cost to call each person three times?
- To print and distribute 500 campaign signs?
- To visit every household in the critical areas of the district?

The first step in answering these questions is to get the vital statistics about your district's demographics and voting behaviors. Gather the following information about your district:

### **Voting Statistics**

Get the returns for the last three school board elections by precinct and complete the following Election Statistics Forms. This information is available from the county clerk's office. You have a legal right to it. There may be a fee to cover the cost of copying. This is a wise expenditure of local IPACE funds. Some counties are slower than others in providing requested materials, so plan ahead and allow ample time for

the processing of your request. If you are gathering data for a referendum, get the returns for the past three school board races and the last three referendum elections. Probably the referendum data will be much older, and there may have been major changes in your school district since then. But referendum elections certainly invite different and more voters than school board member elections.

### **Precinct Maps**

Obtain maps that show the precinct and district boundaries of your school district. These are also available from the school district office or the county clerk. Obtain maps for both city and rural areas.

### **Voter Registration Lists**

These can be found in the county clerk's office and/or elections office. These lists are usually updated about a month before the election. Be sure you get a new list so that you can contact all registered voters who will be supportive. Some private companies provide (for a fee) customized lists of registered voters who are likely supporters. These firms can also provide labels or print these addresses onto a direct-mail piece to be sent to your targeted voters. Most of these firms operate in Springfield or Chicago.

Once you've collected these data, try to answer the following questions:

- How many voters are currently registered in the school district? How many parents and IEA members are registered?
- Is there a trend toward greater or lesser participation in school board elections as evidenced by the voting data you gathered?
- Can you determine what factors affect voter turnout (number of candidates, number of seats up, particular issues, other elections, etc.)?

# Election Statistics Form

## Precinct A

19\_\_                      19\_\_                      19\_\_

---

Total votes cast

---

Number of registered voters

---

Percent of turnout

School board election \_\_\_\_\_ Year \_\_\_\_\_

School referendum election \_\_\_\_\_ Year \_\_\_\_\_ Month \_\_\_\_\_

Name of Candidate	Precincts

# Voter Motivation

The next step is to contact these voters with your message and with person-to-person contact by the candidate and campaign volunteers. This is done by “canvassing” the district by mail, telephone, and door-to-door visits by the candidate and volunteers.

## Finding Favorable Voters

Elections are not won by persuading voters about the “rightness” of issues or by changing minds. In fact, a campaign organization can afford to spend little time in the attempt.

Elections are won by identifying voters favorable to your candidate and then getting them to vote. Effort spent not leading to these goals is a waste. The campaign that develops the best system for contacting and identifying voters supportive of its candidate, and then getting those voters to the polls on Election Day, is usually the winner.

There is a standard procedure for identifying favorable voters in an election district called a voter canvass. The process is described in two different formats. A canvass is most effective when carried out door to door by campaign workers making face-to-face contact with registered voters. An alternative is to use telephones to canvass registered voters.

Many people think of precinct workers as strong-arm sales persons. The general impression is that the worker knocks on the door and harangues the poor voter until he/she obtains his/her vote. Actually, nothing could be further from the truth. The “sales” pitch is really a smoke screen to conceal the worker’s intent to find out who the voter plans to support on Election Day. Elections are won by locating, identifying, and turning out favorable voters.

## Door-To-Door Canvassing

This is the best technique for identifying favorable voters because you can make personal contact with voters, tell them about your issues and your candidate, or even introduce them to the candidate. Later, you can follow up with these favorable voters with a phone call or piece of mail to seal the deal.

**Block or Precinct Campaigns.** Some of those identified as “favorable” during canvassing can be recruited either during the canvass or later on to be in charge of campaigning in their precinct or in their block. You might have volunteers who can serve in these positions also.

Block or precinct captains are usually asked to visit the voters in their area at least once, just before the election. They can also be utilized in get-out-the-vote drives and in other ways.

**Find a Crowd.** Volunteers can always come into contact with people by visiting plant gates, parking lots, office buildings, bowling alleys, bus stops, shopping centers, and generally any place where people are moving along in large numbers.

Volunteers greet the people, ask for support for the candidate, distribute campaign literature, and introduce passers-by to the candidate if he or she is nearby. Although half the people you meet probably won’t vote, you get attention and cause people to talk about the candidate.

## The Candidate’s Role

The candidate is the product the campaign is designed to market. He/she is not, however, a commodity, and cannot be manipulated as one. Design the campaign to present the product accurately and thoroughly to as many people as possible. If the product is good and the campaign effort effective, the votes will be forthcoming.

In some campaigns, the candidate may not know what to do. The campaign staff may find it necessary to educate a candidate early in regard to the issues, strategy, and his/her role in the campaign.

Time not spent talking to a voter is time wasted. The staff is to run the campaign; the candidate is to run for office. The candidate should never be out of things to do.

Personal contact between the candidate and voters is the best way for people to become committed to the campaign. Arrange meetings between the candidate and voters.

Think of ways for him/her to meet parents of schoolchildren, teachers, and other groups that are immediately affected by the policies of the school board. Have the candidate visit schools to check the conditions of classrooms, playgrounds, facilities, and materials to get publicity. These visits can be either announced or unannounced. He/she can challenge the opponent to meet him/her on these tours or arrange for concerned parents and PTA groups to accompany him/her. Try to get your candidate in any forum or question-and-answer

panel that will receive public attention. The League of Women Voters and other community organizations sponsor these. Be sure your candidate is well-prepared for all questions. (Role playing by association members with the candidate before the question-and-answer program is a valuable exercise.)

The following is a step-by-step explanation of door-to-door canvassing that can also be used to orient volunteers in the effort.

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# Sample Instructions to Door-to-Door Canvassers

## What We Are Doing

We're canvassing homes in independent voting precincts to tell voters about (Candidate/Office) \_\_\_\_\_, to give them some campaign literature, and to answer their questions about the candidate.

## How to Do It

This kit contains everything you'll need:

1. *The Voters List.* These are the households you should visit. Most households have more than one registered voter in them. The voters list included in the canvasser's kit must be a walking list — that is, it must be arranged in street and house-number order. Only use a voter registration list organized by street address.

Be sure to code each visit by writing the appropriate symbol in the margin:

- + Favorable to candidate
- 0 Unfavorable, doesn't know
- Unfavorable, hostile
- NH Not at home

Code each household according to your general impressions.

2. *The Volunteer Badge.* Wear your badge that will instantly identify you as a campaign volunteer.
3. *The Candidate Briefing Sheet.* This will tell you about (Candidate) \_\_\_\_\_ and what he/she stands for.
4. *The Campaign Brochure.* Canvassers need copies of the candidate's literature for distribution. Estimate the number of door-to-door contacts, and request the appropriate quantity from the candidate's headquarters. Give each voter one of these.
5. *The Report.* When you have finished, please fill out the canvasser's report, attach it to the remaining materials, and return them to headquarters.

## What to Say

Remember, you're a personal representative of the candidate. The words you say and the impression you make will have a big effect on the voter's decision.

Here's an outline of the canvassing message. You'll need to go over it a few times to get it down in your own words.

1. *Identify Yourself.* “Mr./Mrs. \_\_\_\_\_, my name is \_\_\_\_\_, and I’m a volunteer for (Candidate) \_\_\_\_\_ who’s running for (Office) \_\_\_\_\_. May I speak with you for just a moment?”
2. *Talk About the Candidate.* “We’re helping (Candidate) \_\_\_\_\_ because of his/her concern for our children and the quality of education they are getting in our schools.”
3. *Ask for Questions.* “We’re conducting a people-to-people campaign because (Candidate) \_\_\_\_\_ wants to make sure the people know where he/she stands on all the issues. Is there a particular issue you’re concerned about or any other question you’d like to ask?”

**Answer the Questions**

4. *Offer Brochure.* “Have you made up your mind about the election (Voter’s name) \_\_\_\_\_?” (If yes, determine preference and conclude conversation appropriately. If no, continue.)
5. “I’d like to leave this brochure with you, (Voter’s name) \_\_\_\_\_, to tell you more about (Candidate) \_\_\_\_\_. Please consider voting for him/her on Election Day. He’ll/she’ll be a great (Title for Office) \_\_\_\_\_. Thanks for your time.”

**Special Guidelines**

You’ll find almost everyone polite and willing to listen. If you contact an unfriendly person don’t argue; just terminate the conversation quickly and politely.

If you have questions or problems, call (Campaign Chairperson) \_\_\_\_\_ at (Phone #) \_\_\_\_\_.

**Remember Our Deadline:** \_\_\_\_\_

**Canvasser’s Report**

Good records of all your canvassing efforts are critical for success. In order to again contact the voters most likely to vote for your candidate (or leaning toward your candidate), you must know who they are, what their phone numbers are, and where they live. Ask each volunteer to complete the following form:

TO: Door-to-Door Project Chairperson

I visited my assigned houses in Ward \_\_\_\_\_ Precinct \_\_\_\_\_

<b>The responses were:</b>	<b>Number</b>
Favorable	_____
Undecided	_____
Unfavorable	_____
Not at Home	_____



## Telephone Banks in a Campaign

Door-to-door canvassing is the best technique for identifying favorable voters. It is also difficult to do thoroughly and requires large numbers of volunteers. When it is not possible to carry out a door-to-door campaign, the best alternative is a telephone canvassing campaign. It is faster and requires fewer volunteers.

The procedure is basically the same as the more personal approach. Volunteers operate from a carefully prepared text that identifies the candidate, makes a brief, positive comment about him/her, and inquires if the candidate can count on the voter's support.

The purpose of a telephone canvassing effort — as in door-to-door canvassing — is to reach people in a coordinated, systematic manner.

The initial contact consists of *identification*. The most successful phone banks follow up the initial identification with a mail contact. This initial mail contact may be a general campaign brochure or information specifically directed toward the issue about which the voter is most concerned.

*Follow-up contacts* are essential. Don't rely on a single phone contact to bring the person to the polls voting the way you want. Follow up is best when it is a gentle reminder and reinforcement.

The last level of contact is a *reminder*. This reminder can take the form of a last-weekend reminder to vote and an Election Day series of phone calls until the voter finally does vote.

Identification, follow-ups, and reminders — these are the three types of calls that are most basic to a successful phone effort. (See pages 32 and 33 for voter contact sheets).

The following is a rough outline of steps to take in successfully setting up a phone bank: recruiting, setting up your calling system, dealing with organizing problems, keeping it going, follow-up, and Election Day. Included are phone scripts to use as guides for developing your own phone scripts.

### Recruiting

#### **Do You Have the Resources You Need?**

The two most important resources for a successful phone bank operation are phones

and people to use them. Recruiting phones is easier than recruiting the people to make the calls.

### Phones

The candidate may have access to a bank of phones, either in his or her workplace (e.g., a law firm, union hall, insurance agency, or real estate firm), or the candidate may have a friend in a business that has a number of phones that are available on weekends and in the evenings. Perhaps there is already a campaign office stocked with phones. If there isn't, it should be an objective.

Another idea is to get the local IEA office to surrender their phones on evenings and weekends so that your volunteers can make the necessary calls. The worst case alternative is allowing volunteers to make the phone calls from home. You are never really sure the work is being done and, if it is being done, you can't be sure it's being done in the proper manner.

### People

There are a number of sources for recruiting people to make phone calls:

1. Your friends, friends of the candidate, your family, your candidate's family, your colleagues, and all their friends, etc.
2. A list of members of an association or group likely to lend support to your cause.
3. Snowball recruiting. Every person already recruited and every voter identified as a positive should be asked to work on the campaign. They should also be asked if they know of other people who could help.

There are three general strategies to use while recruiting volunteers:

1. Commitment to the candidate and the issues and goals the candidate represents.
2. Commitment to the person organizing the phone bank as a friend in need.
3. Guilt of having made a commitment to the campaign — not letting the person back out without feeling just awful about having let the campaign down.

### Setting Up Your Calling System

The basic rule is that roughly 85 percent to 90 percent of the people who will vote in the coming election voted in the last similar elec-

tion. For instance, the likely voters in the upcoming school board election voted in the last school board election. The likely voters in the last general election, voted in the last off-year general election. The likely voters in a Republican primary contest for the state legislature, voted in the last Republican primary contest for the state legislature.

**Get the Proper List.** Start by going to the county courthouse for records of those who voted in the last similar election. If possible, copy those names directly onto 4 x 6 cards. If you are unable to obtain a listing of those who voted in a particular election, fall back to the list of all registered voters. If you are unable to obtain a list of registered voters, use the most inefficient call list, the phone books for your area.

Democratic and Republican parties in many areas maintain listings of voters in Democratic and Republican primaries. Depending on the contest you are working on, this may or may not be helpful. Check with these organizations, or obtain the lists you need from friends inside your local party organization.

**When, How, Where to Call.** After you have obtained the list(s) you need, calculate how many calls you need to make. How many volunteers will you need? How many phones will you have available? Make an estimate of long distance phone charges, if any. When will you need to start?

Campaign after campaign makes the same critical mistake: they start calling on the theory of “Oh, we’re going to make all the calls during the last weekend.” The last weekend comes, and they don’t have the phones, the volunteers, the time, or the materials to utilize the phone operation.

In most cases, you should *start calling immediately*. That way you are sure that you have made at least one call to your listing. And you allow time for detailed follow-up calls and mailings. Don’t wait until the last minute thinking the voters aren’t paying attention or don’t care. Get your candidate or message to them before the last minute flurry of media coverage. It will also help to generate more volunteers. Start early, and call often. There are no exceptions.

## Tools for Your Volunteers to Use

If at all possible (if you have time), transfer your paper listings to 4 x 6 cards. Cards can be more efficiently referred to, and the overall progress of the calling operation can be tracked. The drawback of using cards is that they take more clerical time to fill out and get ready. If you have the time and the people to transfer the information to cards, the cards will make your entire phone effort more efficient.

There is now a wealth of customized computer software that can vastly simplify these efforts and make other systems primitive in comparison. However, these can be costly. If you have someone who has the expertise to investigate your options and set up a system to catalog all “plus” voters, you may want to pursue it.

Now comes the painful and tiresome task of *looking up the phone numbers* in directories. In the Chicago metropolitan area, expect that roughly 40 percent of the numbers will be unlisted. In other areas of the state, the percentage of unlisted phone numbers is greatly reduced.

## Elements of a Canvassing Script

Next, you need a script for actual calling. There are several key elements to a script:

- Tailor the script to the people you’re calling.
- Make frequent repetition of the candidate’s name and the office for which he/she is running, and the day and date of the election.
- Ensure that there is essential inclusion of the direct question: “Can we count on your support for (candidate’s name) in the (general/primary/referendum) election for (office) on Tuesday, (month, date):?”
- Ask supporters to volunteer (retain these names so that the phone bank coordinator can call back and recruit them).
- Issue pitch (emphasize one or two issues the candidate supports or reasons for voting favorably in a referendum). Avoid issues which could be considered controversial such as legalization of marijuana, higher taxes, abortion, ERA, etc.
- Offer to send more information.

## Phoning Instructions for Volunteers

Your job is to identify those voters who intend to vote for (Candidate) \_\_\_\_\_. To do this, introduce yourself, tell the voter who (Candidate) \_\_\_\_\_ is and why you're working for him/her, and proceed directly to the question, "Can we count on your support for (Candidate) \_\_\_\_\_?" This question is the most crucial question in the phone script. Ask this question *verbatim*.

Read these instructions carefully before you start.

1. You have a list of registered voters.
2. Use this list and a phone book to look up the phone numbers for the names on the list. When you find a phone number, copy it onto the list. If no phone number is listed, mark NP on the list next to the person's name.
3. Call each person for which you find a phone number.
4. You may notice that two names on the list have identical addresses, but a phone number is listed for only one name. Inquire about all other names listed at the same address. Ask each person the same questions.
5. Call as many times as needed until you have reached everyone on the list that has a listed telephone number.
6. Let the phone ring five times before moving on to the next name.
7. When you contact a person, ask to speak with the person whose name is on the list. When you reach the person you are calling, follow the script below:

"Hello, Mr./Mrs./Ms. (Last name of household) \_\_\_\_\_. My name is \_\_\_\_\_, and I'm a volunteer for (Candidate) \_\_\_\_\_ who is running for (Office) \_\_\_\_\_. There will be an election on (Date) \_\_\_\_\_. I am working for (Candidate) \_\_\_\_\_ because:

Say *one* of the following:

"He/she will work to try to bring business and jobs to the district."

"He/she will work to reduce the budget deficit."

"He/she will work to help out our area."

"He/she will work to strengthen education for our kids."

"Can we count on your support for (Candidate) \_\_\_\_\_ on (Election date) \_\_\_\_\_?"

*If answer is yes:*

"Well, (Candidate) \_\_\_\_\_ is in a tough primary fight. His/her opponent has been making wild attacks on him/her in the newspapers. It is really important that you and the other members of your household be sure to vote on (Date) \_\_\_\_\_."

"Does anyone in your household need an absentee ballot?"

"Thank you for your time, and don't forget to vote for (Candidate) \_\_\_\_\_ on (Election date) \_\_\_\_\_."

(For your strong supporters) "Could you or anyone in your household help us on the campaign?" (Record names and note).

*If undecided:*

"Well, I like (Candidate) \_\_\_\_\_ because he/she does what he/she says he/she will do, and he/she won't promise anything he/she can't do."

"I will send you some information on (Candidate) \_\_\_\_\_. Thank you for your time, and don't forget to vote on (Election date) \_\_\_\_\_."

### ***If no, voting for opponent:***

- “Thank you for your time.”
- If the voter makes a positive comment about the candidate, or if the voter indicates that he/she will vote for the candidate, make a “+” to the left of the voter’s name. *When you mark a plus, there should not be any doubt in your mind that the voter will vote for your candidate.* Proceed to the end of the script, and be sure that you ask strong supporters to help or join the campaign.
- If the voter is unsure how he or she will vote or does not know your candidate, indicate a “0” to the left of the voter’s name. These zeroes will be re-called before the election. Proceed to the end of the script.
- If the voter is hostile toward the candidate, or if the voter says that he/she will support your candidate’s opponent, mark a “-” to the left of the voter’s name. *When you mark a minus there should not be any doubt in your mind that the voter will vote against your candidate, if that voter gets to the polling place.* Thank the minus voter for his/her time and hang up. Never argue.

### **On Election Day**

- You may want to incorporate your Election Day “get-out-the-vote” effort with the telephone work. You may call all of your (+) voters, and urge them to vote. Remind

them that the polls are open from 6:00 a.m. until 7:00 p.m. If your precinct checker keeps track of your (+) voters, you may find it necessary to call them back a second time. Remember the name of the game is getting more voters to the polls for your candidate than the opposition can. A favorable voter who stays home is of no consequence.

### **Pointers:**

- Proceed quickly through the calls you have been assigned. Do not get into long, drawn-out conversations. Your job is not necessarily to persuade or convince the voters. Your job is to give them your candidate’s name, let them know when the election is, and to quickly identify voting preference. The mere fact that you’re taking the time to call the voter persuades.
- If a voter requests information on a specific issue note the issue, the name, address, and phone of the voter, and the date on another piece of paper.
- Never call a previously identified minus.
- Be friendly, courteous, direct, and informal, using the script as your guide.

Good voter identification will aid your candidate immensely. Your valuable volunteer effort on the phone provides your candidate with a critical, and much needed, link with voters.

# Voter Contact Sheet

Last name	First name	Spouse	Phone home/work
-----------	------------	--------	-----------------

Street address	City	Precinct
----------------	------	----------

Date	Time	+ - O NA Response	Follow-up
Date	Time	+ - O NA Response	Follow-up
Date	Time	+ - O NA Response	Follow-up
Date	Time	+ - O NA Response	Follow-up
Date	Time	+ - O NA Response	Follow-up

## Friend-To-Friend Calls Form

The following is a form for volunteers to call their friends and neighbors to ask for support for your candidate.

Volunteer name \_\_\_\_\_

Local association \_\_\_\_\_

I have contacted the following friends/relatives/neighbors/acquaintances, and each one has indicated that he/she will support (Candidate) \_\_\_\_\_ for (Office) \_\_\_\_\_ on (Election date) \_\_\_\_\_.

	<b>Name</b>	<b>Phone</b>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

The Illinois Political Action Committee for Education (IPACE) has recommended (Candidate) \_\_\_\_\_ for (Office) \_\_\_\_\_.

(Candidate's) \_\_\_\_\_ position of leadership as (Office) \_\_\_\_\_, has proven his/her performance as a pro-education, pro-labor advocate, and the fact that he/she has been targeted for defeat by his/her opposition makes it *vitally important* that *all* school employees in the area actively work for his/her election.

You can do *your* part to make sure that we elect (Candidate) \_\_\_\_\_ as our (Office) \_\_\_\_\_, by completing the information on the back of this card and returning it to your association building representative by (Date) \_\_\_\_\_.

## Follow Up

Following the initial phone contact (identification call), each non-minus voter on the list should receive a piece of mail. It is important that voters without listed phone numbers and undecided voters receive some mail.

As soon as you complete calling through the list and mailing to your pluses and zeroes, then begin with follow-up calls. Remember that a single, isolated phone call is not as helpful as a coordinated series of phone calls.

The second call is simple and is based largely on the voter identification from the first call. Identified “pluses” get a call that is designed to remind them there is an election, to vote, and to remind them to vote for the candidate you offer. Zeroes get calls that reiterate the first call. The call again asks the zeroes: “Can we count on your support for (Candidate) \_\_\_\_\_ in the election for (Office) \_\_\_\_\_ on Tuesday, \_\_\_\_\_ (Election date)?” Then, based on the answer to that question, zeroes remain zeroes, or they are changed to minuses or pluses.

Minuses are never called again. There is no need reminding someone voting against your candidate that an election is coming up.

## Election Day Calls

If possible, pluses and zeroes should get a reminder call the weekend before the election. Start calling the pluses and then move to the zeroes. That way, if an interruption occurs (or if you run out of time), your best voters have been reminded.

On Election Day, you should call all your pluses. Commence calling about 9:00 a.m. Keep calling with a quick, short reminder to vote. Call at 9:30 a.m., 11:00 a.m., 1:00 p.m., 3:00 p.m., 5:00 p.m., and 6:00 p.m., if possible. Don’t stop calling. Many people need to be reminded six to seven times before committing themselves to vote — especially in low-turnout and low-visibility elections. You won’t lose a vote with repeated callings. The voter may get angry with the caller, but not the candidate.

When possible, calling lists should be double-checked with poll-watching records of who has voted. This procedure will often streamline the calling effort — focusing on getting those voters predisposed to your cause who have not yet voted.

## Specialized Lists of Supportive Organization Members

The following is a script for calling association members to fold them into the calling effort. This script could be adopted to call any specialized list of members of a supportive organization.

### Association Members Calling Association Members

“Hello, is this \_\_\_\_\_?”

“My name is \_\_\_\_\_ and I’m a volunteer for (Candidate) \_\_\_\_\_ who is running for (Office) \_\_\_\_\_.”

“You probably know that there are a number of proposed cuts for the funding of education. Your professional association, the IEA, has recommended (Candidate) \_\_\_\_\_ who is running for (Office) \_\_\_\_\_ in the election on (Election date) \_\_\_\_\_. (Candidate) \_\_\_\_\_ has pledged to keep education a priority and work hard for the interests of education and teaching.”

“Can we count on your support for (Candidate) \_\_\_\_\_ in the election on (Election Date) \_\_\_\_\_?”

### If Yes:

“(Candidate) \_\_\_\_\_ is in a tough election fight. Could you help us by making phone calls from our office, helping to get mailings out, and helping with other important activities?” (If yes, note address and phone.)

### If Undecided:

“Can I send you (Candidate’s) \_\_\_\_\_ position papers on education or other issues?” (If yes, note address.)

### **If No:**

“Thank you for your time.”

### **Dealing with Organizing Problems**

Door-to-door or phone canvassing is logistically complex and often frustrating. You must recruit and schedule dozens of volunteers, prepare enough work for each, and supervise them closely to make sure they are calling the voters you want to be called with the message you want to be delivered.

Below are some common concerns in most canvassing efforts and suggestions that can make your job easier.

### **Scheduling**

Working with volunteers on a phone bank can be exceptionally frustrating, unless you over-schedule. Volunteers are not paid — by definition. Therefore, there are all kinds of reasons why they may not show up. So if you have five phone lines, schedule about eight people for any one time slot.

If by some miracle all the volunteers do indeed show up, be sure you have extra work — looking up phone numbers, addressing, etc. that can be done.

### **Timing**

Call whenever people are most likely to be home. Again, call early, and call often. The best times to coordinate a phone bank are weekdays 5:00 p.m.-9:30 p.m., 10:00 a.m.-9:30 p.m. on Saturday, and 11:00 a.m.-9:30 p.m. on Sunday. Do not be shy or timid about calling during the dinner hour, right up until 9:30 p.m., and on weekends. Those are generally the best times to reach people.

### **Responsibility**

Responsibility for any phone operation should rest with *one* person. Often, campaigns divide responsibility in a committee-like fashion. Though the committee system is great for many endeavors, it spells the death knell for many campaigns. Generally, unless one person is calling the shots on a phone bank, the work is not done.

### **Keeping It Going**

After the initial excitement that stems from something new, a phone bank can get monotonous.

The purpose of a phone bank is to deliver a routine, simple call/message to voters in a repetitive fashion. As the monotony and the routine take over, it is the responsibility of the phone bank coordinator to liven up the place. Here are some ideas:

- Be sure that the candidate stops by the phone bank regularly. Frequently, one handshake and a chance to chat with the person one is working for will justify many hours of calling on the part of the volunteers.
- Run a contest. The prize is dinner with the candidate for the volunteer who completes the most telephone calls in a week.
- Stroke volunteers — tell them they are doing a good job. Remind them that personal one-on-one contact is the most persuasive element a campaign has. Tell a volunteer that every 100 phone calls is equivalent to about five one-minute radio ads. Remember volunteers are not paid, so make it easy for them to justify their efforts.
- Make sure there are refreshments available.
- Set clear goals and show how the campaign is reaching those goals.
- Make sure no hostile or unkind words are spoken in the presence of any campaign workers. People are much more likely to return to an environment that is free of bickering or sarcasm.
- Thank people every time they come in and when they leave.
- Finally, set a rule: *No caller shall leave the headquarters without again signing up for a specific time when they will come back and make calls.* This rule will save many hours of the phone bank coordinator’s time. It will avoid having to re-recruit the caller. Time should be spent recruiting new people to come in — not the same people who have been calling. Think snowball.

### **Coffee Social for Candidate**

Coffees serve two functions in a political campaign. Coffees are a forum for the candidate to meet people who attend, but even more important, they are a technique for recruiting new workers. The system described is designed to accomplish both objectives. For school

board or statewide campaigns the candidate is often unavailable to attend, but possibly someone from the campaign can attend for the candidate.

The coffee coordinator is responsible for promoting attendance at coffees once they are scheduled. This person must encourage the host/hostess and involve others in making attendance at the coffee the highest priority.

An information packet should be developed to include:

- Candidate biographical information sheet,
- Campaign brochures, and
- “How to organize a successful coffee” instruction sheets.

Invitations should be sent several weeks before the date of the coffee. A follow-up phone call by the host/hostess to those invited is essential. If no one is coming, don’t waste the candidate’s time.

Before the guests arrive, the host/hostess arranges the room to maximize informality and promote candidate exposure. After guests arrive, share with them the candidate’s background information. After 15-20 minutes, the candidate or surrogate arrives to discuss issues for ten minutes and then answers questions. The candidate or surrogate leaves, and the host/hostess makes a pitch for workers, money, and pledge sheets. The pledge sheet allows the guest to determine how they can best help with the campaign. Pledge sheets are returned to the campaign, along with unused materials.

### **How to Organize a Successful Coffee**

1. Who to invite: friends and neighbors, especially those who have not decided on a candidate. The object is to garner voters, volunteers, and money. Try to invite people who are new to your area and independent voters.
2. How to invite: contact your guests several times to be sure that they will come.
3. How many to expect: only one-third of the total invited will probably attend. It is safe to invite twice as many as your home can handle.
4. How to prepare: keep refreshments simple. Coffee, tea, or punch and cookies are plenty.

5. Time involved: try to encourage your guests by assuring them that the coffee will only take one hour. No long speeches, just a golden opportunity to meet a candidate whom you know they will want to meet.

### **Mail Voter Contact**

Direct mail tells a specific group or a large general constituency exactly what the candidate wants them to know. Mail reaches everyone. It can get into almost everyone’s home and tell what you want. Remember: no mail can be sent anonymously. It must identify the sender.

Political direct mail, used inappropriately, is often the most wasteful element in a campaign. Used wisely, it can be a potent element. Some useful specific purposes for political direct mail are:

- As a follow up to voter identification, telephone, or door-to-door visit.
- As a “common purpose” introduction, announcement of recommendation, persuasive appeal to a group that would tend to be allied with the candidate on an issue, or to a group alienated by your opponent.
- To build volunteer morale through thank-you letters, reminders of assignments, and a newsletter about campaign progress. Small mailings can be neatly copied, folded, stuffed, stamped, and results recorded by volunteers. Large mailings often require the services of a writer, printer, and a letter shop.

### **Mail Day**

Mail Day is a program through which thousands of voters are reached on a personal level. Everyone reads his or her mail, and postcards sent by a friend on behalf of a candidate are influential. The personal message reinforces more formal contacts.

Mail Day is a low-cost way to involve volunteers who will work only at home in a practical, manageable program, with great impact. Teachers could recruit other teachers as the core of a Mail Day writers’ group or coordinate their efforts with allied groups in a coalition program.

The goal of Mail Day is to have 100-150 volunteers each write 50 cards to friends, relatives, neighbors, and acquaintances. The

writers will receive kits with instructions. After the cards are written and stamped by the writers, they are returned to campaign headquarters. All the cards are then mailed together on the designated Mail Day.

Each Mail Day has a chairperson who can spend a great deal of time locating people who will help recruit Mail Day volunteers and supervising the operation.

### Mail Day Kits

Each kit includes:

- Memo to Mail Day writer
- 60 postcards
- Sample messages
- Return-addressed, postage-paid envelopes for sending completed cards back to the chairperson.

### Continuing Duties of the Mail Day Chairperson

1. Send kits to writers as they are recruited. Fill out a Mail Day volunteer card for each writer and keep it up to date, marking all follow-up action.
2. Four days after the kit is mailed, call the writer to express appreciation and encourage him/her to do a good job.
  - Thank him/her for volunteering to help, and find out if he/she received the kit.
  - Ask if he/she has any questions, and encourage him/her to start writing his/her postcards now!
  - Impress upon the volunteer that there is a deadline and how much early-return cards will mean to the program.
  - Be friendly and help; don't nag.
3. Follow up on kits that are not returned. Call writers who have not returned their kits within a week after receiving them. The call should be friendly. Let the volunteer know the candidate is depending on him or her. Find out when the volunteer thinks he or she can finish, and get a commitment that he or she will do it. If necessary, make a second call. This call must be handled diplomatically. Don't irritate the volunteer. Emphasize that the reason you are calling is because it is so close to Mail Day. Ask if you can pick up the kit.

### One Week Prior to Mail Day

1. Make an all-out effort to obtain as many postcards as possible, re-call all writers, and encourage them to complete and return as many cards as they can.
2. Offer to pick up cards on several days — whenever it is convenient for them.
3. Have kits delivered by hand, if possible, to speed up returns. After Mail Day, the candidate should personally thank with a letter each volunteer who helped in Mail Day.

### Suggested Source List for Card or Letter Writers

1. Your Christmas/New Year's card list.
  2. Any club or organization you may belong to, such as:

Garden	Rotary
Bridge	Kiwanis
Toastmaster	Sertoma
Optimist	Fraternal Organization
PTA	
  3. Church societies
  4. Union membership lists
  5. Co-workers
  6. Business associates
  7. Alumni groups (high school and college)
  8. Neighbors
  9. Anyone you know not mentioned above
- If you know of anyone who would like to be a Mail Day writer, please call your recruiter and let him or her know.

Mail Day chairperson's address

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Telephone

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Recruiter's address

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Telephone

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# Get-Out-The-Vote

We will have worked hard to elect a friend of education by Election Day. We will have put up signs, participated in phone banks and door-to-door canvasses, held coffees, written postcards, and more. However, all of our efforts will be for naught unless our members vote. It is crucial for you to develop a local “get-out-the-vote” plan.

## Guidelines for Effective Get-Out-The-Vote Activity

Use your local association structure.

- Know the location of polling places. You can obtain this information from your county clerk or local election authority.
- Use your local “phone tree” to call every member in your local the Monday before Election Day, reminding them to vote on Election Day.
- Organize your ARs to walk around and contact each member Election Day morning and after school. The “get-out-the-vote” reminder should emphasize the importance of our participation.
- Call all voters identified as a “plus” voter on your voter contact sheets. Urge them to get out and vote as early as possible. Remind them where their polling place is and when it closes.
- Walk through precincts with a high percentage of vocal support for your candidate(s) and place paper hangers on their doorknobs. These hangers should have the candidate’s name and a slogan on the front. They could also remind them to vote, tell them the address of the precinct they’re in, include a phone number for a hotline that arranges free rides to the polls, etc.
- Encourage our members to have their spouse and household vote to elect a friend of education. With this action we can double our vote.
- Ask members to contact neighbors and friends who participated in coffees and other events the Monday before Election Day with a reminder to vote.

Close elections, even statewide contests, are won by two or three votes per precinct. Your local association’s “get-out-the-vote” plan is crucial to our electing a friend of education.

## Visibility, Communications, and PR

### Basics

Bumper stickers, lawn signs, buttons, etc. with your messages on them are used in most campaigns, and their value is widely debated. In school board elections these items have some important purposes. First, they call attention to the fact that a school election is about to occur, something not always apparent to voters because these are often special elections with low voter turnout.

Second, these visibility measures, if widely and strategically dispersed, can give the impression of widespread support and thus lend the effort some credibility. Finally, lawn signs and other visibility measures give voters without a lot of time or resources the opportunity to participate in your effort.

Signs should be of a uniform color and easy to read, with a simple slogan, like “Smith for School Board” or “Bob Smith, District 35” to make your position obvious. Subtlety may get you some chuckles from your supporters, but it will confuse undecided voters — the very people you are trying to influence. Keep a record of who agrees to put up a yard sign, and contact them in future campaigns.

### Candidate Forums

Candidate forums are an excellent way for your candidate(s) to express their views to the public and media while still in a somewhat controlled atmosphere. Set up your forum/debate date early, picking a date that will be best for media coverage. Make sure the time and date is free of conflicts with other events and is convenient for most of your supporters. Hold the event in a neutral spot, like a school or community center.

The forum must have the appearance of utmost fairness and could be sponsored by an outside group, such as the League of Women Voters, the local PTA or other civic groups, or

even your own PAC. Pick a format that is favorable to your candidates and their skills. Do you want panelists to ask questions? Who will the panelists be? Will the audience have input and if so, when? Will there be opening and closing statements? Will there be time limits?

### **Organizing Your Communications Effort**

Public perceptions — and the perceptions of your local association members — of your campaign are very important to the success of any political effort. A successful communications effort that changes these perceptions is no accident. You need to plan your work and set reasonable goals that can give you an edge over the opposition in the local media and within your ranks.

### **Form a Communications Committee**

This should be made up of knowledgeable and respected individuals — preferably those with excellent oral and written communications skills — within the organization. The committee could be as few as two or three people.

List the objectives of your effort. Who do you want to influence? What are the opinions you want them to have? What kind of headlines would you like to see in local newspapers and hear on radio and television? Put your objectives on paper, and modify them as your campaign evolves.

### **Know Your Local Media**

After you've settled on a strategy, examine the local media and determine what sort of stories make the news. Some media outlets have only confrontational and "big-picture" stories — like the television news or some radio stations. Others prefer a local focus and provide a calmer picture of events. Tailor your style to the media outlet you want to target. If the television station you want to attract to your event covers confrontational events, then a long, scholarly news conference with lots of people in business suits may not make news, but a protest at your opponent's office might.

### **Plan Something That Will Make News**

Remember: only something that the media think is newsworthy makes the news. The first rule is to find something that is *new* and unexamined, a new fact or reality that has not been

previously broadcast. "News," according to the news media, is usually something that:

- Affects a lot of people.
- Is connected to or has an impact on the local area.
- Is timely.
- Involves prominent people in the community or elsewhere.
- Is a "human interest" story that may have an emotional impact on readers, listeners, or viewers of the local media.

Equally important is your presentation. This is particularly true for television and newspaper photographers. Unfortunately, a mediocre idea and a flashy presentation can sometimes prevail. Television stations want an interesting and active visual event to cover, with color, movement, and instantaneous recognition by the viewer.

A couple of examples may help explain this.

**If Don Smith, the candidate you oppose, has voted to cut state education aid by 20 percent, then create a banner that says, "Don Smith Cuts Education for our Children by 20 Percent." Create a large poster that lists about a dozen programs now available to children. Use a scissors and cut away the three or four programs at the bottom of the list that will have to be eliminated because of Smith's vote.**

**If you are supporting legislation that prevents violence in the schools, arrange confiscated weapons on a table in front of your speaker, with a large banner behind him or her, with the slogan, "Stop Violence in Our Schools." Explain when and how the weapons were found.**

These ideas may seem dramatic, and they are just that. Effective media communications — particularly for television — are often show business, with scripted participants, staging, and choreographed events. If you want to participate in this type of activity, these techniques will help you get your message on the air — for free — and out to the general public and your association members.

Perhaps you could tie your story to other events that are taking place somewhere else, but getting coverage in your community newspapers and broadcast media. For instance, if Congress is considering cutting education funds to states, show how that will hurt students' education in your school district.

Don't forget to keep records of your media coverage, and most importantly, public statements made by your opposition on television, radio, and in the print media. This information is critical if your opponent(s) decide to modify or try to obscure their position on an issue important to the district. If the opposition has a press conference, send a representative with a video or tape recorder to record the event.

### **Create a Simple News Release**

A news release is nothing more than a piece of paper that shows how you would like to see the story written in your local newspaper. In fact, if you write a news release in the same style of some local newspapers (often weeklies), they will print it verbatim. Most will not, but the news release is still one of the most important building blocks of your media campaign, because *it gives the media exactly what you want them to print or broadcast as your official position.*

The first paragraph in news stories and press releases is called the "lead." This is the most important part of your release. It summarizes the news of your story, getting to the heart of the matter so editors can understand what you're writing about at a glance.

Leads answer the most important of the following six questions:

- Who said it or did it?**
- What was said or done?**
- Where did it occur?**
- When did it occur?**
- Why did it take place?**
- How did it happen?**

You won't be expected to answer all the questions, but you should answer most, emphasizing those that are most newsworthy. Here's an example of a lead:

**Jansonville Education Association President, Mary Crenshaw, today called on local State Representative Don Smith to vote against a bill that would cause the Jansonville High School district to cut vocational programs and eliminate half of all extra-curricular activities at the school, including music programs.**

After your lead, present the rest of your news in descending order of importance. The vital details go into the second paragraph, the next most important details in the third, and so on. This is called the "inverted pyramid" style of writing.

The most difficult aspect of this writing style is deciding which facts are most important. Vital information should never be at or near the end of a release because you want to grab the editor or reporter's attention and make your point early, before he or she has a chance to throw away your release.

Be sure to use active verbs for your release. For instance, stay away from:

**"Violence and weapons in local schools could be curtailed if the state legislature passes the Violence in Schools Act," said Jansonville Education Association President Mary Crenshaw.**

**You should write, "Violence in local schools may continue or increase if the state legislature fails to pass the pending Violence in Schools Act," Jansonville Education Association President Mary Crenshaw said today.**

Releases should use simple words, not complicated jargon. Add quotes to provide variety between factual paragraphs. Quotes are often put directly into the story by the newspaper writer. And, be sure to double check all spelling and punctuation. Mistakes can hurt your credibility.

## **For Immediate Release**

Contact: Mary Crenshaw at 309-555-1312

### **Jansonville Education Association President Crenshaw Decries Violence in Local Schools**

#### **Urges State Representative Smith to Vote for Violence in Schools Act to Promote Safer Schools**

Jansonville Education Association President Mary Crenshaw, displaying dozens of weapons confiscated at Jansonville schools, today called on State Representative Don Smith to vote for the Violence in Schools Act, which would help stem the rising tide of violence in our local schools.

Crenshaw, holding aloft a .38-caliber revolver confiscated from an 11th-grader at Jansonville High School last spring, urged Rep. Smith to join the battle to get guns, knives, and other weapons out of our schools.

“Rep. Smith has opposed the Violence in Schools Act, but we are hoping he will listen to reason. Our children’s lives depend upon it,” Crenshaw said.

Billy Loman, a 9th-grader at Jansonville Junior High School, described how during lunch one day, two older students threatened him with a large knife if he didn’t give them all the money in his wallet.

“I gave them the \$10 I had, and they pushed me hard against a wall and left. I don’t know why they should be allowed to bring things like that knife into school. I’m afraid, and lots of other students are too,” Loman said.

Crenshaw said the Violence in Schools Act, now being considered by the state legislature is the “single most important piece of legislation this session for our children,” and urged Rep. Smith and others to pass it immediately. The bill would:

- Give grants to high-risk schools to help install security systems and hire security personnel to ensure a safe atmosphere for students and teachers.
- Allow administrators to expel students immediately for possession of a firearm on school grounds.
- Make it a felony for an adult or a student to carry a weapon onto school grounds.

“These measures are essential if we are not only to keep our kids safe, but provide a nurturing environment for them to learn and succeed. I urge Rep. Smith to reconsider and help the children of this district,” Crenshaw said.

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## **Media Alerts or Advisories**

Media advisories or alerts are brief releases used to notify the press about upcoming events. Ideally, these should be faxed or e-mailed to the media (and followed up with a phone call) 2-3 days before an event. A sample media advisory is shown below:

### **For Immediate Release**

Contact: Mary Crenshaw at 309-555-1312

### **Media Advisory**

#### **Jansonville Teachers Association President to Hold Press Conference to Discuss Violence in Jansonville Schools**

Jansonville Teachers Association President Mary Crenshaw will hold a press conference to discuss the rising level of violence in Jansonville schools at 10:00 a.m. on Thursday, October 24, at the Jansonville Community Room, 111 N. Main Street.

On display at the event will be dozens of dangerous weapons confiscated on school grounds by teachers and administrators. Teachers and students will give first-person accounts of their experiences with violence and weapons in Jansonville schools.

## How to Prepare for an Interview

When newspaper, television, or radio reporters ask for a comment — about something mundane or extremely controversial — there are some simple rules to follow to help preserve or enhance the image of your association, your candidate, or your political effort. Unfortunately, there are often deadline-driven time pressures that make these tasks more difficult or harrowing, but not impossible. If you keep your cool, the process is very easy.

**Ask for Clarification.** Make sure you understand the issue well. Ask the reporter if he or she has any special needs. What is their deadline? Are they covering this from any particular angle? What do they know about the issue? Tell them you prefer not to respond to someone else's comments or ideas unless you have the exact wording or have something concrete to go on. Ask them to send you information if they have it and if there's time.

**Give Yourself Time.** Don't be afraid to ask questions or to ask the reporter for some more time before you respond. Don't overextend yourself. Explain what your expertise is on the issue, and find someone else to do the interview if you don't feel comfortable.

**Choose One Spokesperson.** Having two or more people in the organization talking to the media on a particular issue — and inadvertently contradicting one another — is a poor strategy. If you will be doing the interview, plan ahead of time what you are going to say, and practice with someone else role-playing the reporter. Have the other person ask you both general and hostile questions to prepare you for the best and worst experiences. Do this until you are comfortable with the subject and calm in the face of all types of questions.

**Control the Interview.** You have the ability to help shape how the reporter files the story if you stick to your plan and stay on the message. If you wander from the topic, you run the risk of steering the reporters away from your objective and allowing them to write about an unrelated issue. If the reporter tries to pull you away from your objective, steer him or her back to the important points.

For instance, if your objective is to talk about a legislator's support for cuts in education aid and the reporter asks, "Didn't the local IEA chapter support Representative Smith's opponent in the last election, and isn't this just politics?" You could respond by saying, "We support the children and the parents of this district and are striving for a quality education system. Representative Smith has voted to cut the amount of education going to our district's children, and that is what we oppose." Never say, "no comment," because it conveys the feeling that you are hiding something. If you are unable to comment because the issue is in litigation or is governed by confidentiality laws, say so.

If this is a phone interview you can refer to notes while talking, or even read a prepared quote so that you can get it just right for the newspaper or radio interview. This will help you feel and sound prepared, but don't overdo it by having too many papers in front of you and shuffling them around during the interview. Concentrate on the information you think is most important and that can be conveyed in a short interview.

Be as succinct and accurate as possible, emphasizing only the major points. Remember, although your interview with TV or radio reporter(s) may take 20-30 minutes or more, only an 8-15-second sound bite is likely to appear on the evening news or radio broadcast. *It is essential that you plan ahead on what you want the reporters to come away with after the interview, and focus only on those points during the interview.*

For TV interviews, wear a button or sticker that emphasizes your issue position or membership so that it will be clearly visible to TV watchers. Set up signs or banners behind the place where you will be talking. It is better to have many smaller signs rather than one big one, since the TV coverage may include only a small portion of your interview, using a close-up of your head and shoulders and not a wider shot of the entire room.

Give the reporter a press release, fact sheet, and a business card. This reduces the work for the reporter and makes it more likely that your issue position and association title (as well as

the spelling of your name) will be recorded accurately in the story.

**Be Honest.** Former U.S. House Speaker Tip O’Neill said, “Tell the truth the first time, and you don’t have to remember what you said.” You may withhold relatively unimportant information, but withholding important information or saying something untrue on the record is the worst thing for the credibility of yourself as a news source and your association.

**Be Careful What You Say.** *Never, ever, say anything on the record to a reporter that you do not want them to write as a banner headline on the front page of your newspaper.* Even off-the-record comments can sometimes become fair game to reporters and can reach the news pages or be read on-air by a broadcast reporter. The best way to avoid having embarrassing or damaging comments in the media is never to say them to a reporter.

**Remain Courteous and Helpful.** Do not argue with a reporter or lose your cool. Offer the reporter more detailed information as it becomes available. Take the reporter’s name, phone number, fax number, e-mail address, and write down any notes you have about the encounter. Send him or her any additional information you have on the subject later. Keep these records for the next time you want to call the media for an event or when you’re asked to respond to an issue.

Never complain if the interview is not used or if only a short portion is included. This is typical with radio and television reporters who only have a tiny one- to two-minute slot to fill, including your quote. If the content of the report is inaccurate, chalk it up to experience, write a letter to the editor, or respond in the broadcast media with an on-air editorial that clarifies, without undue confrontation, your position.

### **Summary: How to Promote Your Event or Story Idea to Your Local Media**

Reporters are always on the lookout for news. Because they can’t go door to door asking, “Got any news?” they usually rely on a network of reliable sources for their information.

You can be a valuable, reliable source for several reporters in your area, but first you

must know the reporters, know how they work, and the best ways to work with them. Find out which reporters cover education or tax issues for the newspaper, as well as other issues of interest to your association, and keep a list of these reporters, their address, phone numbers, and fax numbers.

Call these reporters to introduce yourself as the communications committee chair or the local association president. Go to lunch, and get to know them. These contacts will pay off when you need their attention or when you’ve got to defend your association on an issue that is likely to negatively affect the public’s perception of the association.

These steps help ease the way when you get ready to conduct your press event. Follow these steps when you want to have a successful news conference or event.

**Write a Press Release.** See details and an example in the section titled, “Create a Simple News Release,” page 40.

**Send Out Your Press Advisory.** Distribute it via fax to all reporters that cover the area you’ll be talking about. For most events, this should be done 2-3 days in advance. For important breaking news, this could be done the morning of the event, but you risk losing reporters with prior commitments. An easy way to do this is to use a fax modem on a computer that can sequentially dial multiple fax numbers. This saves time and headaches associated with waiting at your fax machine. Sending advisories by mail is risky, since they could arrive too late for the event.

**Call Reporters.** Make a very short call to determine if they received the advisory and tell them briefly about the event. Call again the day before the event to remind them.

**Hold Your Event or Press Conference.** Bring copies of the release and other information to give to reporters. In cases where you’re not sure the reporter will come, send out the release via fax early in the morning with a notice at the top that reads, “Embargoed until 10:30 a.m. Tuesday,” or whatever the time of your event is.

***Fax Your Release and Follow Up With a Phone Call to All Reporters not at Your Event.*** Even though they didn't come to your event, you might still get good coverage if you take the time to get them your information.

### **Television Coverage**

TV cameras have arrived, as you hoped, for your association rally, town meeting, or other event. Or a local TV reporter has asked to interview your local president or legislative coordinator about the local impact of some congressional action. What can you do to get the most out of your 10 to 20 seconds on TV?

#### **At a Rally**

Gather your people together to make your group look like a crowd. Widely dispersed small clusters of people and stragglers don't give the impression of a big turnout.

Get the people on their feet and holding their signs high. A TV picture of people sitting on or leaning on their signs does not show much enthusiasm or commitment.

If you have a microphone or podium set up for speakers, put signs or banners up behind the speaker, on the podium, or direct people with IEA signs to stand behind and beside the speaker. When the cameras turn to the speaker, the IEA logo and message will be in the picture.

#### **At a Meeting**

Before the meeting, ask all participants to wear IEA buttons, lapel stickers, t-shirts, or caps. Consider handing out stickers at the door as people arrive. Cover the room with signs with your message and logo. Wherever the TV cameras turn, they will see your message.

Direct your members to sit between the cameras and the podium or focal point of the meeting. Make sure there are a number of signs in this area as well.

### **Talk Radio**

Radio talk shows are an increasingly important way for political ideas to be expressed. Frequently, opponents of education host these shows, and the participants many times are skeptical of public education spending, particularly for teachers and other school

employees. You can have an impact on such radio talk shows, but only if you participate as a guest or caller.

→ Here are some suggestions:

#### **As a Caller**

Know the kind of subjects that the producer/host looks for in deciding which calls to accept. Call if you are prepared to present the "real world" of school employees to the host, or if you feel the callers or interviewees do not understand what's really happening in your school or in education.

Offer an answer or explanation to the previous caller — often a way to get ahead of the list of potential callers. Many smaller stations do not screen calls and you will be on the air as soon as the host picks up the phone.

Avoid education or budget jargon; speak clearly without the use of acronyms. For example, say "cost-of-living adjustment" instead of "COLA." Identify yourself as a teacher or school employee if you feel it will add credence to the subject; otherwise you can call as an ordinary citizen who has an opinion of interest to the listeners.

#### **As a Guest**

→ Before approaching the show's producer or host...

Find out about the typical format for the show and the topics usually covered. Learn about the host's style and political philosophy. Is he or she confrontational or diplomatic? Is he or she conservative, moderate, or liberal?

Come up with an interesting idea that stands out from among dozens of topics talk show producers consider each day. Ask yourself what interests the average person. People tend to respond to stories affecting their health, heart, home, and pocketbook.

→ Some topics, for example:

- The effect of the federal or state deficit spending on education — perhaps during debate on a balanced budget amendment to the U.S. constitution.
- State, local, and federal financial support for schools.
- Drugs, guns, and violence in our schools.
- Charter schools or vouchers.

- Financial-watch-list schools in your area.
- Local referenda or school board elections.
- Innovative and/or unique education programs in your local schools.

Be prepared to describe your expertise or subject area in brief terms to the program's producer (sometimes the host). While negotiating your appearance, don't put limits on what you are willing to say. Once you have the interview and you're asked a question that is uncomfortable or that you're unwilling to answer you can say, "I'm not that familiar with that subject," or "I think a better person to ask would be...," and mention another person in your association or in the educational community.

### **Once You've Been Offered the Interview**

Ask the producer/host for the general line of questioning you can expect to receive (without asking about *specific questions*). Inquire about the length of the interview and whether there will be questions from listeners. Are there other guests? Who was the previous guest, and who will go on after you?

Listen to the show the day before your interview and while you're driving to your interview. This will help you get a feel for the tenor of the show. If appropriate, make reference during your interview to issues that came up the previous day.

Provide the producer your title and other biographical information that will help frame your knowledge of the topic and help the host introduce you on the air. Have some key facts at your fingertips prior to going on the air. Use one or two sheets of paper. No one can see you looking at these, and it will help your credibility if you are able to recite some relevant facts and figures. A few note cards are best, because large amounts of paper can distract you from your conversation with the listeners and can make a lot of noise.

### **While On the Air As a Program Guest...**

Listen carefully to the caller's name — you may want to write it down — and respond to the caller by using their name. This will make the caller feel more comfortable and perhaps less confrontational. Note any regional or neighborhood location of the caller — it might

provide some insight into the question and help you to respond to a specific concern. If you are knowledgeable about the area, mentioning your expertise could help build your credibility with the listener and the audience.

Establish yourself as an authority on the subject being discussed. "I've been an educator for 20 years, and I've seen such initiatives many times before..." Don't overload the audience with facts. Give them just enough to make your case and show your expertise.

Be energetic. Remember you're on the radio, and your voice conveys your personality and that of your organization. Make your points with enthusiasm, energy, and confidence — but without sounding rehearsed. Answer multiple questions in any order you choose; you are not obligated to answer all three or four inquiries from one caller.

Challenge any terms or characterizations with the host or caller that you find inappropriate, such as "bureaucrats" or "overpaid and under-worked." Set the host or caller straight by using your own term or characterization.

Do not match hostile questions from a listener or the host with your own hostility. Instead, slow down your answers, and disarm the questioner with your calmness and attention. Agreeing with a part of the hostile caller's argument can disarm them and help influence the caller and the general audience. Find as much common ground as possible. Counter hostile callers with quotes or facts from sources that they respect. For example, "President Ronald Reagan said in 1987 that this issue was critical to education and agreed with our position."

Localize the topic. If you're talking about a national issue, find a way to link it to something that is happening in the radio station's listening area.

Be prepared to answer the question, "Is there anything else you want to add?" Talk show hosts often end the program with this question. This is your chance to state your position clearly and succinctly to the people you want to influence.

### **After the Show...**

If the show goes well, offer to come back. Hosts welcome return guests, especially those

who thrive on the spontaneity of the program and seem to enjoy the give and take.

Ask colleagues who listened to the program what answers they thought were the best and which needed work. How would they have answered them, keeping the general listening audience in mind?

### **Letters to the Editor**

An easy way to get your message to the public is through letters to the editor. These should be short, carefully edited, and very succinctly written — usually no more than 300 words. An ideal letter is just a few paragraphs long and thus more likely to be read by editors and the newspapers' readers. Writing about something you saw in the newspaper increases the chances they will print it.

If your association members say they don't have the time to write such letters, appoint someone to write several or many letters — all different — and distribute them to teachers who will agree to sign them and send them to the newspaper as if they were their own.

### **Newspaper Opinion Pieces**

If a 300-word letter to the editor is not enough space for you to make your point, then an alternative is to write an opinion piece for the editorial page, also called an "op-ed." Many newspapers allow citizens representing

local groups to respond to editorials or news stories in this lengthened format of up to 800-1,200 words.

Remember, even though this format is longer, you still need to put the most important information at the top of the piece, just as in your news releases. The reason is that most readers will skim the first few paragraphs, the last few, and move along. This should be written in a snappy style, with humor, transitions, frequent paragraph breaks, and subheadings if possible. This provides variety for the reader and helps you pull the reader in so you can make your point.

### **Radio and Television Editorials**

Radio station managers and owners, and (less frequently) television station managers, read on-air editorials to which groups can respond. These can be up to three minutes long, and require text that is different than the one you use for an op-ed piece. Read it aloud to see if it *sounds* right, because when the same word is either written or spoken it can be more or less effective, depending on the forum in which it is used. Record yourself, and practice in front of a camera or other people to get it right. For television, use makeup to give yourself some color under the harsh TV lights. Someone at the station can help you with your makeup if you're not sure how to apply it.