

# **Texas Advocacy Playbook**

Marlene S. Lobberecht, M.S., CFCS, CFLE



February 2019

© 2019 by Marlene S. Lobberecht

Copyright holder is licensing this under the Creative Commons License, Attribution-NonCommercial (CC BY-NC) 4.0. License: <http://creativecommons.org/licenses/by/4.0/us/>. Creative Commons, 171 Second Street, Suite 300, San Francisco, California, 94105, USA.



**Please feel free to post this eBook on your non-commercial website, blog, or share via e-mail with others that you believe may benefit from its contents or resources. I welcome your feedback. Thank You!**

Special thanks to and for:

- My immediate family for understanding, patience and support of my passion for advocacy.
- Supportive friends and colleagues, too numerous to single out, for your mentoring and inspiration from the following professional associations:
  - American Association of Family & Consumer Sciences,
  - League of Women Voters Cy-Fair,
  - Texas Council on Family Relations,
  - American Association of Family & Consumer Sciences-Texas Affiliate,
  - Texans Care for Children, and
  - League of Women Voters Texas.
- Specific training presentations and/or resources provided by the following governmental and non-profit entities, associations, organizations and coalitions (referenced on page 38):
  - American Association of Family & Consumer Sciences, and
  - Texas Legislature Online.

Again, thank you to the many professional associations and organizations that explore issue analysis to establish public policy priorities trying to ensure Texas implements critical next steps in building a high quality, integrated, family-focused system for individuals ages zero to eternity, families, and communities in Texas.



## Table of Contents



	Page Number
Introduction	4
Texas Health and Human Service Commission	5
Advocacy, Lobbying, Federal IRS Regulations	6
Lobbying vs. Public Education	10
Texas Legislature Overview	11
How Bill Becomes a Law	14
Tentative Dates for Legislative Session	14
Legislature Glossary of Common Terms	17
Roberts Rules of Order Basic Review	21
Eleven Levels of Advocacy Involvement	23
How To's for Online Tracking of Bills	23
Letters or E-mails to Legislators	25
Telephone Calls to Legislators	27
Work with the Media	29
Visit to Your Legislator	30
Testify at the Capital	31
Public Hearings and Testimony	33
Become a Direct Action Organizer	34
Issue Analysis Process	35
Direct Action Organizer Strategy Plan	36
Resources	38
Five Ways I Can Be an Advocate & Issue Identification	39



Texas aspires to be a land of opportunity, and for many, is just that. Indeed, Texas attracts people. Each month, thousands of families, workers, students, and retirees become “new” Texans. This continuous flow also drives economic growth, replenishes the state workforce, and revitalizes urban, suburban, and rural areas across Texas. A sustainable growth agenda is necessary to truly improve economic well-being, enhance marketable skills, and create wealth-building opportunities for Texans.

There is a growing awareness among many families and individuals that forces outside their home affect their lives. This has always been true, but for many years, few people have considered it their place to do anything about these forces. They felt that someone else would take care of the problem. Today is a great time to become more involved in doing something about community problems, especially those that affect families. The challenge is to identify the problems, and understand the underlying issues and ways to effectively address the issues.

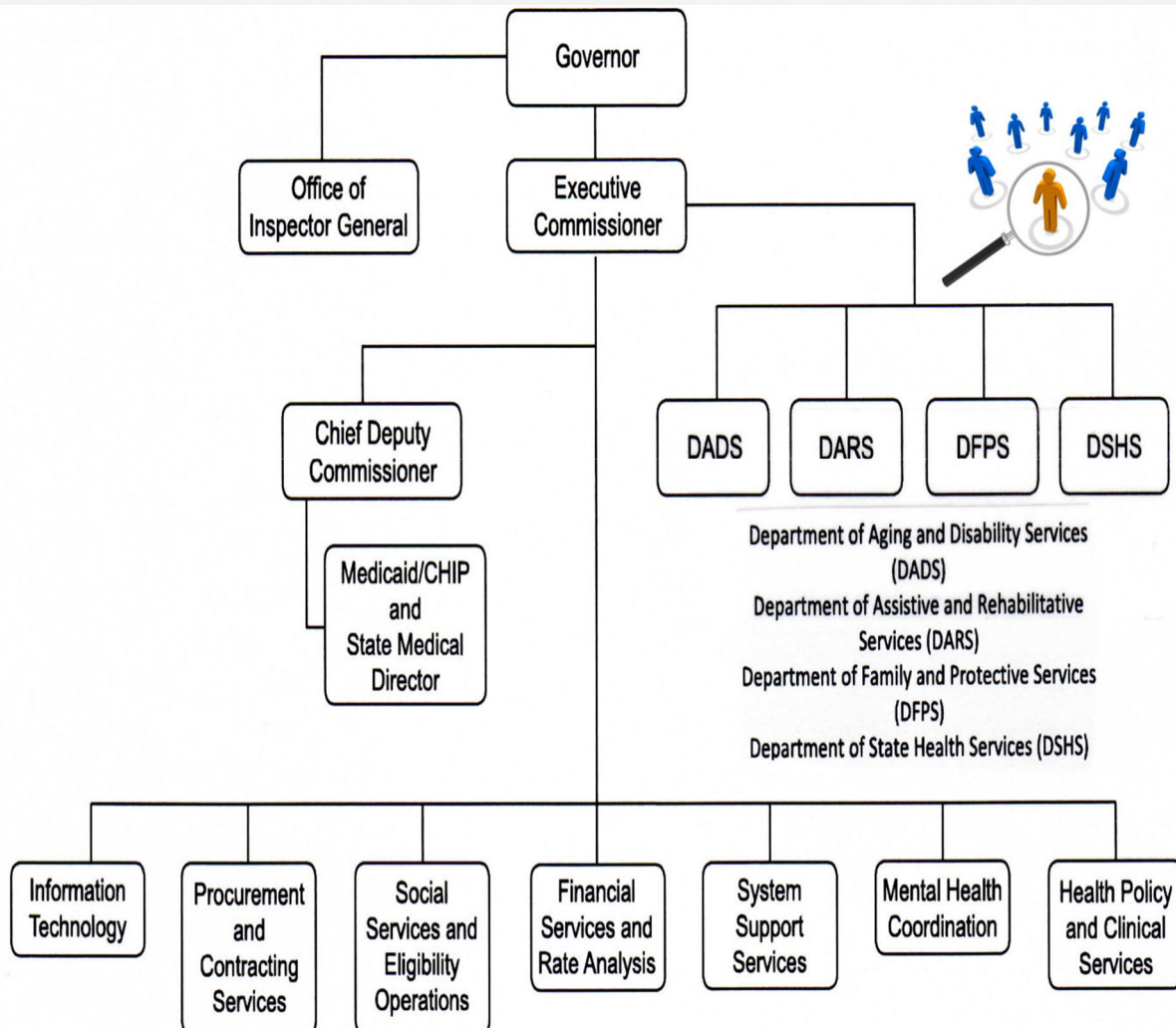
Service agencies and organizations provide valuable services to the citizens in a community. In most agencies and organizations, employees, volunteers and board members are in a better position and more knowledgeable about needed public policies and programs than the individuals with the authority and power to make the changes. Therefore, it is critical that those involved in these services become advocates and voices for change through the Texas Legislature. However, the same information would apply to all levels of government.

## Texas Health & Human Services Overview

The Texas state is of significant importance to the delivery of education, health and human services in Texas. The Texas Constitution, state statutes and appropriations designated by the legislature determine which programs are established, funded and how they will be administered by state or local government. One system, the Texas health and human services system, includes five agencies operating under the oversight of the Health and Human Services Commission.

The following diagram illustrates their alignment and focus:

### ***Health and Human Services Commission Organizational Chart***



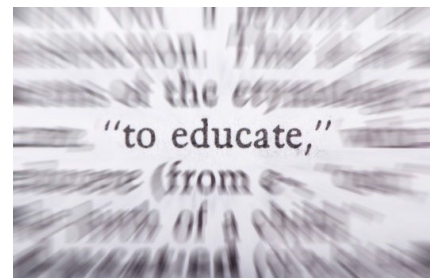
## Advocacy

Best short definition of advocacy is brief: Advocacy just means “**speaking up.**” Generally, advocacy could be identifying a problem, proposing a solution and reaching a goal or building support to act on a problem. Technically, advocacy (noun) is the act of pleading or arguing in favor of something, such as a cause, idea, or policy; active support. Unlike propaganda, advocacy is expected to be non-deceptive and in good faith. It can technically also be a verb; advocate is to speak or write in favor of; support or urge by argument; recommend publicly.

That’s legal any time, by anyone. Lobbying is just one form of advocacy, with a very specific definition: communications with elected officials (or their staff) that urges a position on a pending piece of legislation. That too is legal, within certain limits.

### To be an effective advocate:

- One needs to know what is the issue/need or problem to be solved.
- What does it take to solve the need/ problem?
- Who makes the decision(s)?
- Understand the legislative rules and process.
- How, when and why to communicate and meet with decision-makers and policy-makers.
- When is the time frame for the decision to be made?
- Who is an effective partner(s) to join in your message?



## Lobbying

The legal definition of lobbying usually involves attempting to influence legislation. Advocacy covers a much broader range of activities that might or might not include lobbying. One way to differentiate between the two terms is **to understand that lobbying always involves advocacy, but advocacy does not necessarily involve lobbying.**

## Federal IRS Technical Regulations on Lobbying by Nonprofits

In 1976, Congress passed legislation (Section 1307 of Public Law 94-455) that clarified and expanded the extent to which nonprofits could lobby without jeopardizing their tax-exempt status. A nonprofit must elect to come under the 1976 lobby law. Under the law, lobbying by a nonprofit is only the expenditure of money by the organization for the purpose of attempting to influence legislation. When there is no expenditure by the organization for lobbying, there is no lobbying by the organization. The key point to remember is that *lobbying occurs only when there is an expenditure of funds* for an activity that meets the other criteria for lobbying.

Public Charities that wish to engage in lobbying may do so legally under one of the following two standards by which compliance is measured by the IRS:

- "Insubstantial Part Test": The Internal Revenue Code has required since 1934 that no substantial part of a charity's activities ... be carrying on propaganda or otherwise attempting to influence legislation. "Substantial" is not further defined, vague and open to interpretation by IRS auditors. Includes both cash and non-cash items, including unreimbursed volunteer expenses. Since the risk is losing exempt status, most charities using this method arbitrarily limit themselves to little or no lobbying activities.
- "Section 501 (h) Expenditure Test" (recommended): Starting in 1976, the IRS set specific dollar limits, calculated as a percentage of a charity's total exempt purpose expenditures, on the amount it may spend to influence legislation without losing its exempt status or incurring penalty taxes.
  - Calculation is clear and easy to compute. Provides substantial benefits over the "insubstantial part" test.
  - Applies to cash expenditures only. There is no limit on lobbying activities that do not require expenditures, such as unreimbursed activities conducted by bona fide volunteers.

All nonprofit organizations certified by the Internal Revenue Service (IRS) as Section 501(c)(3) organizations must let the IRS know the degree to which they might be "lobbying". Nonprofit organizations must comply with federal laws and regulations as well as state laws and regulations governing lobbying.

The federal government and the IRS provide significant latitude with nonprofits *communicating* with their bona fide members about legislation and other governmental matters, particularly when such legislation or government decisions might affect the existence, powers, duties, tax-exempt status or the provision of charitable contributions to the organization. If you need clarification, you may call the IRS Exempt Organization toll-free line at 877-829-5500. IRS will not do research for paid professionals, but will answer questions for volunteers.

There is less latitude, however, when nonprofits ask their members and/or the general public to *lobby* the government on an issue. Nonprofits that receive federal funds must complete very detailed forms to assure the government that they are not using federal funds to do such lobbying.

The law also defines two kinds of lobbying - ***direct lobbying*** and ***grassroots lobbying***.

***Direct Lobbying:*** when a nonprofit organization encourages its members to contact government officials on legislation, it is considered "direct lobbying". An example of direct lobbying would be when you visit a state Senator about a bill and then contact members of your organization and ask them to contact legislators about the bill.

***Grassroots Lobbying:*** when a nonprofit states its position to the general public and asks the general public to take action to impact specific legislation. It is only when an

organization reaches beyond its members to get action from the general public, that grassroots lobbying occurs.

Stating your position to the general public without a "call to action" is not considered lobbying. Examples of grassroots lobbying include:

- Asking the general public to contact a legislator, staff person, or other government official formulating legislation;
- Providing contact information for the person you want to be contacted;
- Providing a petition, postcard or similar item to make the contact; and/or
- Identifying legislators' views on specific legislation.

There are provisions in the law that identifies important exceptions to the "lobbying" definitions. The IRS does ***not*** consider the following to be lobbying by nonprofit organizations:

- Making available the results of **nonpartisan** analysis, study or research (as *long as you* are not advocating *legislative* action);
- Providing **technical advice** or assistance to a governmental body or committee, in response to a written request by such body;
- Appearances before, or testimony and other communications to any legislative body, with respect to a possible decision by such body which might affect the existence of the organization, its powers and duties, its tax-exempt status or the deduction of contributions to the organization (the so-called "*self-defense* exception");
- Communications between the organization and its bona fide members, with respect to legislation or proposed legislation of direct interest to the organization and such members, so *long as* members are not *directly* encouraged to *lobby*;
- Communications with government officials or employees *where the* nonprofit is *not attempting to influence legislation*; and
- Examinations and discussions of broad social, economic and health problems even if the problems are of a type which the government would be expected to deal with ultimately.

Nonprofits **cannot**:

- Endorse or oppose a candidate for elective office;
- Mobilize supporters to elect or defeat candidates;
- Print partisan materials; or
- Contribute money to a political party campaign or political action committee (PAC).



During **election** seasons there are activities nonprofits can participate in and some they cannot. What nonprofits **can** do during an election season:

- Continue normal lobbying activities during a legislative session; and
- Consider conducting nonpartisan election-related activities such as:

- **Candidate Visits and Public Forums:** Invitations must be extended to all legitimate candidates for an office; the candidates may not fundraise or campaign on the premises;
- **Candidate Questionnaires:** Nonprofits with a broad range of concerns can safely disseminate responses from candidate questionnaires. The questions must cover a broad range of subjects, be framed without bias, and be given to all candidates for an office.
- **Testimony on Party Platforms:** Nonprofits may testify before party platform committees at the national, state or local levels; testimony should be offered equally to both parties, and both parties' platform committees should receive copies of the testimony.

What nonprofits **cannot** do during an election season:

- Lend space, equipment, supplies, etc. to candidates or a party - if a nonprofit sells space or a mailing list, it must be at fair market value and available for all candidates;
- Coordinate activities with a political campaign;
- Endorse a candidate; or
- Allow staff to contribute time at the expense of the organization; it must be done on their own time.

There are activities that do constitute active lobbying and are permitted, provided that they fall within the spending ceilings established by the law. The spending ceilings are based on percentages of the nonprofit's budget for the year, beginning at 20 percent of the first \$500,000 and ending at 5 percent of expenditures over \$1.5 million. There is an overall maximum ceiling of \$1 million per year for lobbying expenditures.



## LOBBYING CEILINGS UNDER THE 1976 FEDERAL LOBBY LAW

Exempt-Purpose Expenditures	Total Lobbying Expenditures	Amount of Total Allowable for Grassroots Lobbying
Up to \$500,000	20% of exempt-purpose expenditures	One-quarter
\$500,000 - \$1 million	\$100,000 + 15% of excess over \$500,000	\$25,000 + 3.75% of excess over \$500,000
\$1 million- \$1 .5 million	\$175,000 + 10% of excess over \$1 million	\$43,750 + 2.5% of excess over \$1million
\$1 .5 million- \$17 million	\$225,000 + 5% of excess over \$1 .5 million	\$56,250 + 1.25% of excess over \$1.5 million
Over \$1 7 million	\$1 million	\$250,000

For more specific information about the 1976 Lobby Law please refer to the following resources:

- U.S. Internal Revenue Code of 1986, as amended, especially Sections 501 (a), 501(c)(3), 501 (h) and 4911.

- The Tax Reform Act of 1976, approved October 4, 1976, (specifically, Section 1307, "Lobbying by Public Charities").
- Advocacy strategy that nonprofits can use to advance their cause from: [www.bolderadvocacy.org/navigate-the-rules/influencing-legislation](http://www.bolderadvocacy.org/navigate-the-rules/influencing-legislation).
- Restriction of Political Campaign Intervention by Section 501(c)(3) Tax-Exempt Organizations (Jan 2015) from [www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations/The-Restriction-of-Political-Campaign-Intervention-by-Section-501\(c\)\(3\)-Tax-Exempt-Organizations](http://www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations/The-Restriction-of-Political-Campaign-Intervention-by-Section-501(c)(3)-Tax-Exempt-Organizations).
- Compliance Guide for 501(c)(3) Public Charities, Pub 4221-PC (07-2014) from [www.irs.gov/pub/irs-pdf/p4221pc.pdf](http://www.irs.gov/pub/irs-pdf/p4221pc.pdf).
- One Voice, "Advocating for a Healthy Texas: Advocacy 101" (April 2008) Houston, TX, Pgs 4-6.

**Seek Advice First If Lobbying.** Rules related to advocacy and lobbying are complex and evolving. Many of the rules apply to fact-sensitive areas and issues. As such, the simple rule of thumb is: A nonprofit organization, or individual representatives of the organization, should check with their legal counsel before embarking on lobbying initiatives.

**Special Note to Employees of Nonprofit Organizations:** It is perfectly legal for employees of nonprofit organizations to lobby (excluding private foundations, churches, their auxiliaries, and conventions and associations of churches). Alliance for Justice provides free one-on-one technical assistance to nonprofits via phone and e-mail. Call 822-6070, 9:00 a.m.-5:30 p.m. EST, Monday-Friday, or e-mail through the web site [advocacy@afj.org](mailto:advocacy@afj.org). Just ask for nonprofit advocacy technical assistance.


**In summary, can I lobby or should only provide public education?** Whether or not you lobby or provide public education on an issue is based on the specific rules of your place of employment, as well as your comfort level. Begin first by asking your director and/or human resources department what rules your place of employment has regarding lobbying.

## Lobbying vs. Public Education

	Attend Press Conference (Officers handles)	Invite to Visit/View Photo Exhibit	Conduct Legislative Visits	Talk to a Legislator About Your Program & the Importance of Your Priorities	Send a "Call to Action" to Colleagues Encouraging Them to Contact Their Legislator	Mention Specific Legislation in a Legislative Visit
Lobbying					<b>X</b>	<b>X</b>
Public Education	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>		



## Examples of Public Education & Two Types of Lobbying

Public Education	Direct Lobbying	Grassroots Lobbying
<p>General information about a specific issue expressed to the general public or a legislator.</p> <p>For example, “Life skills are critical in terms of improving the school readiness of teens and securing a strong workforce for the future.”</p> <p>“My program serves 100 at-risk families and provides parents with the tools necessary to become effective school partners.”</p> 	<p>Communication to a legislator expressing a view about specific legislation.</p> <p>For example, telling a legislator, “We are asking you today to co-sponsor Senate Bill 123 in support of the Texas Family Coalition legislative agenda.”</p> <p>“Senate Bill 123 has a number of important components that will improve secondary education in the state of Texas.”</p> <p><b>*Any mention of a bill number is considered lobbying</b></p>	<p>Communication to the general public expressing a view about specific legislation requesting a call to action.</p> <p>A call to action includes:</p> <ul style="list-style-type: none"> <li>• Telling recipients to contact their legislators (even without providing specific contact information);</li> <li>• Providing legislators’ specific contact information;</li> <li>• Providing a mechanism to contact a legislator (e.g. petition, postcard, link on a website); or</li> <li>• Listing names of legislators voting on a bill or those undecided or opposed to the organization’s view on the legislation.</li> </ul>

## Brief Overview of the Texas Legislature

Getting legislation passed in Texas can be very difficult. A bill (a proposed law) must move through many different and complicated channels before it becomes law. Advocates work with the Legislature throughout the process, offering expertise, research, and providing leaders with input from a collective voice.



### Some Important Texas Legislature Facts:

- The Texas Legislature meets once every two years, between January and May (140 days). This means leaders have only a short time to get things done. The Texas Legislature is comprised of two sections: the House and the Senate. The House has 150 members elected every 2 years; the Senate has 31 members serving 4-year terms – ½ of Senate elected every 2 years.
- Speaker of the House, elected by a majority of House members at the beginning of each legislative session, presides over the House. The Speaker appoints a House Speaker Pro-Tempore, who assists the Speaker and presides in his/her absence.
- Lieutenant Governor, who is elected in a statewide election every four years, presides over the Texas State Senate. The Senate elects the President Pro-Tempore of the Senate, who presides in the absence of the Lieutenant Governor.

- According to House and Senate rules, which are established at the beginning of each Legislative session, both the Lieutenant Governor and Speaker of the House make all committee appointments, chairmanships, and assignment of bills to committees. The Speaker of the House may vote on all legislation. In the Senate, the Lieutenant Governor may only vote to break a tie.
- A legislator introduces (files) a bill that may have been drafted by anyone - legislators, state agencies, advocacy organizations, etc. However, the majority of bills introduced are drafted by professional staff members of the Texas Legislative Council. The Council provides legal, research and data processing services for both chambers.
- A bill can be introduced to the Legislature through either the House or the Senate, but all bills must pass through both sections to become law. Pre-filing begins as early as the Monday following the November general election in even-numbered years. Once the session begins, legislation may be introduced through the 60<sup>th</sup> day of the session. After the 60<sup>th</sup> day, bills may only be introduced upon a 4/5 vote of approval in the chamber, unless they are local-impact bills or bills deemed "emergency" by the Governor. The Texas Constitution requires that all revenue-raising, i.e. tax, bills originate in the House of Representatives.
- All bills go through a committee process before becoming a law. The Texas Constitution also requires that a bill must be read on three separate days in each legislative chamber, though this rule may be suspended by a 4/5 vote of approval. The first reading of a bill occurs when the bill is introduced and referred to a committee.
- The Legislative Budget Board (LBB) prepares the general appropriations bill (state budget). The LBB does very limited drafting of bills. The composition of the LBB is: Lieutenant Governor, Joint-Chair; Speaker of the House, Joint-Chair; Chair, House Committee on Appropriations; Chair, House Committee on Ways and Means; Chair, Senate Finance Committee; two House members appointed by the Speaker; and three Senate members appointed by the Lieutenant Governor.
- The Governor of Texas has the final authority on any bill that has passed the House and the Senate within 10 days during the legislative session, or within 20 days of Legislature adjournment. The governor may sign, veto or allow a bill to become law without a signature.

## Legislative Committees

The legislative committee chairs, appointed by the Lieutenant Governor and Speaker of the House, play a significant role in the passage of legislation. The only formally required **action on a bill** is that it be read aloud (1st reading- "**caption**") and assigned to a committee for study. Once in committee, it is up to that committee, particularly the chair, to determine if the bill will be amended, rejected, tabled or approved. Once a House bill leaves committee, it must be scheduled for consideration on the House floor by the House Calendars Committee/Local and Consent Calendar Committee or it dies. In the Senate, bills must be scheduled for regular order of business consideration on the Senate floor



by the Lieutenant Governor or the Senate Administration Committee if the bill only affects a local geographic area of the state.

Legislators on a committee and their staff are the first point of contact for advocates to influence a piece of legislation. It is in the committee process that most of the work on a bill is usually done. Most education or health and human services legislation is assigned to one of the following committees for consideration: **House of Representatives** - Public Education Committee, Human Services Committee, or Public Health Committee; **Senate** - Health and Human Services Committee or Public Education Committee.

There is no **requirement that a committee take action on every bill** referred to it. A bill not voted favorably out of a committee is considered dead for the session. Sometimes committees refer a bill to a subcommittee for review and consideration. The committee or subcommittee has **five options**: 1) pass the bill as is; 2) pass the bill with amendments; 3) pass a substitute bill; 4) choose to table the bill; or 5) vote against its passage. If a bill passes out of the subcommittee, amended or otherwise, it returns to the full committee for its review and consideration. If the bill receives a majority affirmative vote of the members present at the committee hearing, it passes out of committee.



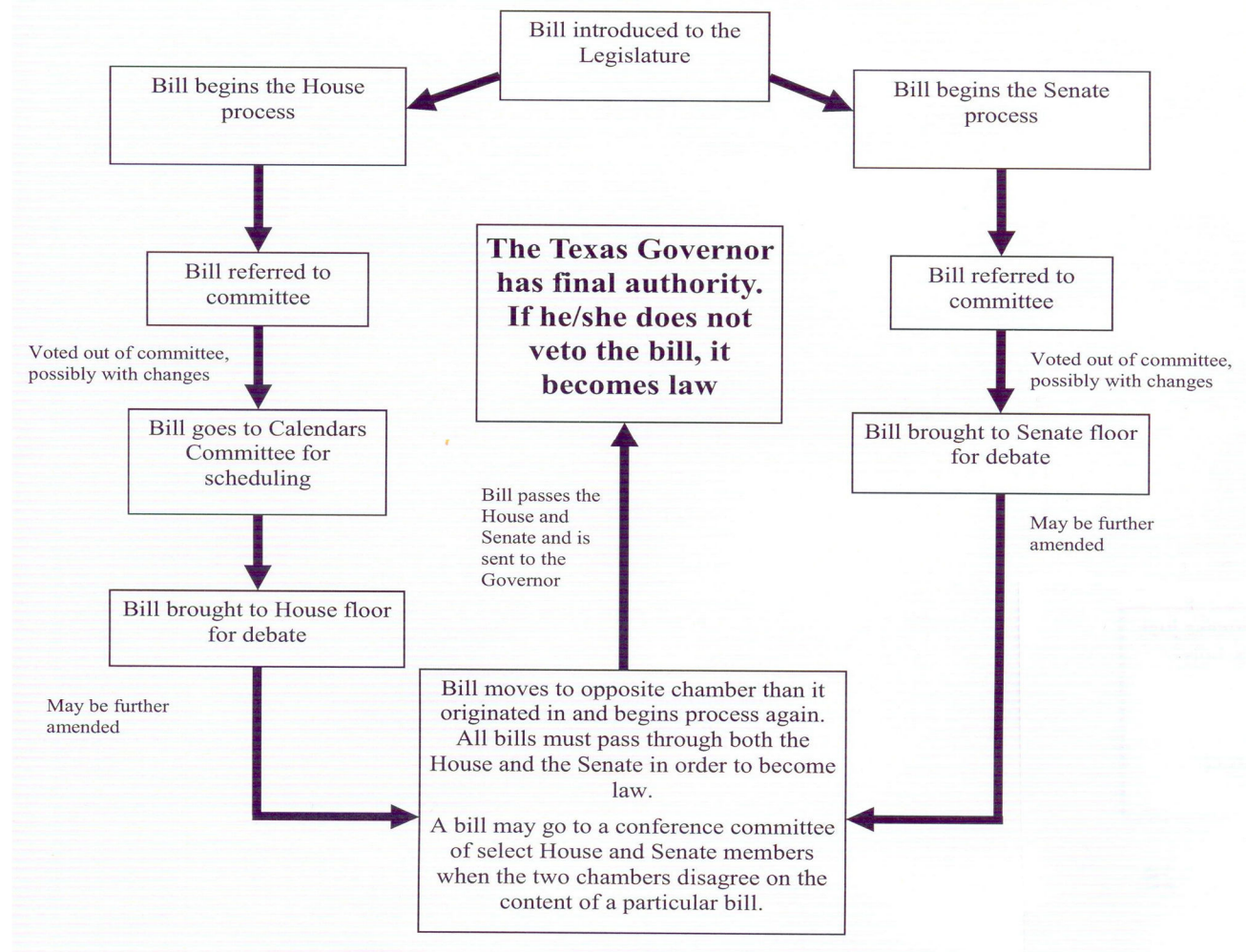
Before a bill can be brought up for its *second reading*, it must be scheduled for floor action. In the Senate, the Lieutenant Governor (or for local-impact bills, the **Senate Administration Committee**) must schedule the bill for floor action. In the House, the **House Calendars Committee** (or for local-impact bills, the Local Calendars Committee) has this responsibility. The Senate also usually adopts a rule at the beginning of each session requiring a 2/3 vote of approval before any bill can be brought up for debate on its second reading. After a bill passes its second reading, it can be considered for third reading.

A bill that passes the House or Senate on its *third reading* is considered "**engrossed**". It is then sent to the other chamber and the process begins all over again. If a House bill is amended by the Senate, or vice versa, it is returned to the chamber of origin for "**concurrence**" on the amendments or a Conference Committee is appointed to reconcile differences between the House and Senate versions of the bill.

When both chambers approve a bill in identical form or adopt the conference committee report, it is "**enrolled**" in final form, signed by the presiding officers of the Senate and the House, and sent to the Governor. The Governor has ten days to either approve or veto the bill. If vetoed, the bill is returned to its chamber of origin along with a statement of objections (if the legislative session is already over, the bill is dead). If still in session, the Legislature can override a veto by the Governor with a two-thirds vote of both chambers. If the Governor does not sign or veto a bill within ten days (20 days after the last day of the session), it becomes law without his/her signature.

During a legislative session the **date the legislation becomes effective** is written into the bill. However, the Texas Constitution forbids legislation from taking effect earlier than 90 days after adjournment unless it receives a 2/3 vote of approval in each chamber. As a result, the effective date most frequently written into legislation is September 1 of the year the Legislature passes the bill.

## How Bills Become Laws in Texas



### Tentative Dates for the Texas Legislative Session (Government Codes & Texas Constitution-[www.capitol.state.tx.us/MnuCalendars.aspx](http://www.capitol.state.tx.us/MnuCalendars.aspx))

During the second or third week of January (1st day) Legislature convened at noon

60th day - Deadline for filing bills and joint resolutions other than local bills, emergency appropriations, and bills that have been declared an emergency by the governor

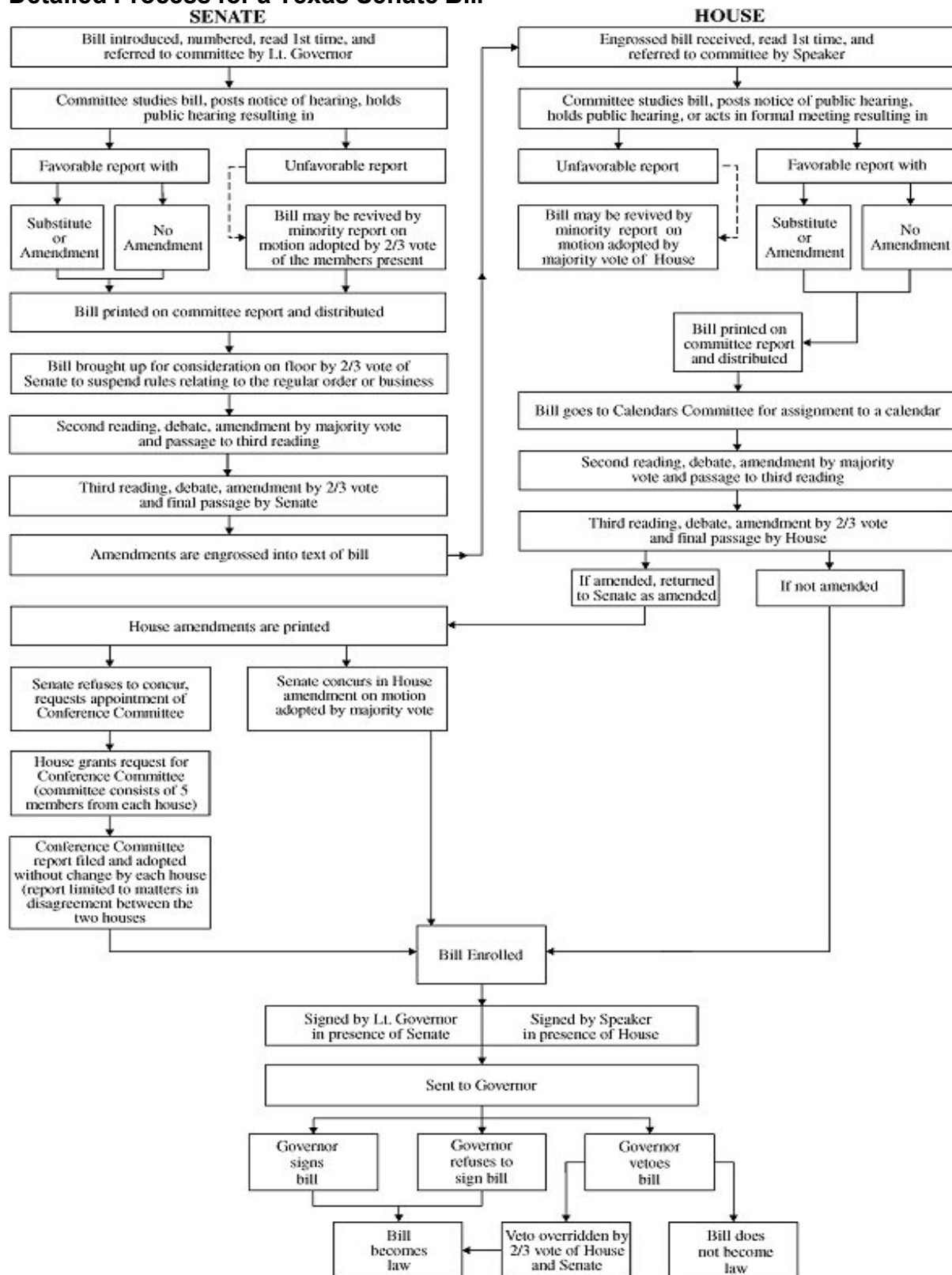
Approximately one week before close of session at midnight – last day for House floor discussion and voting on bills.

End of May (140th day) - Last day of the Regular Session; corrections only in house and senate.

20th day following final adjournment - Last day governor can sign or veto bills passed during the previous legislative session.

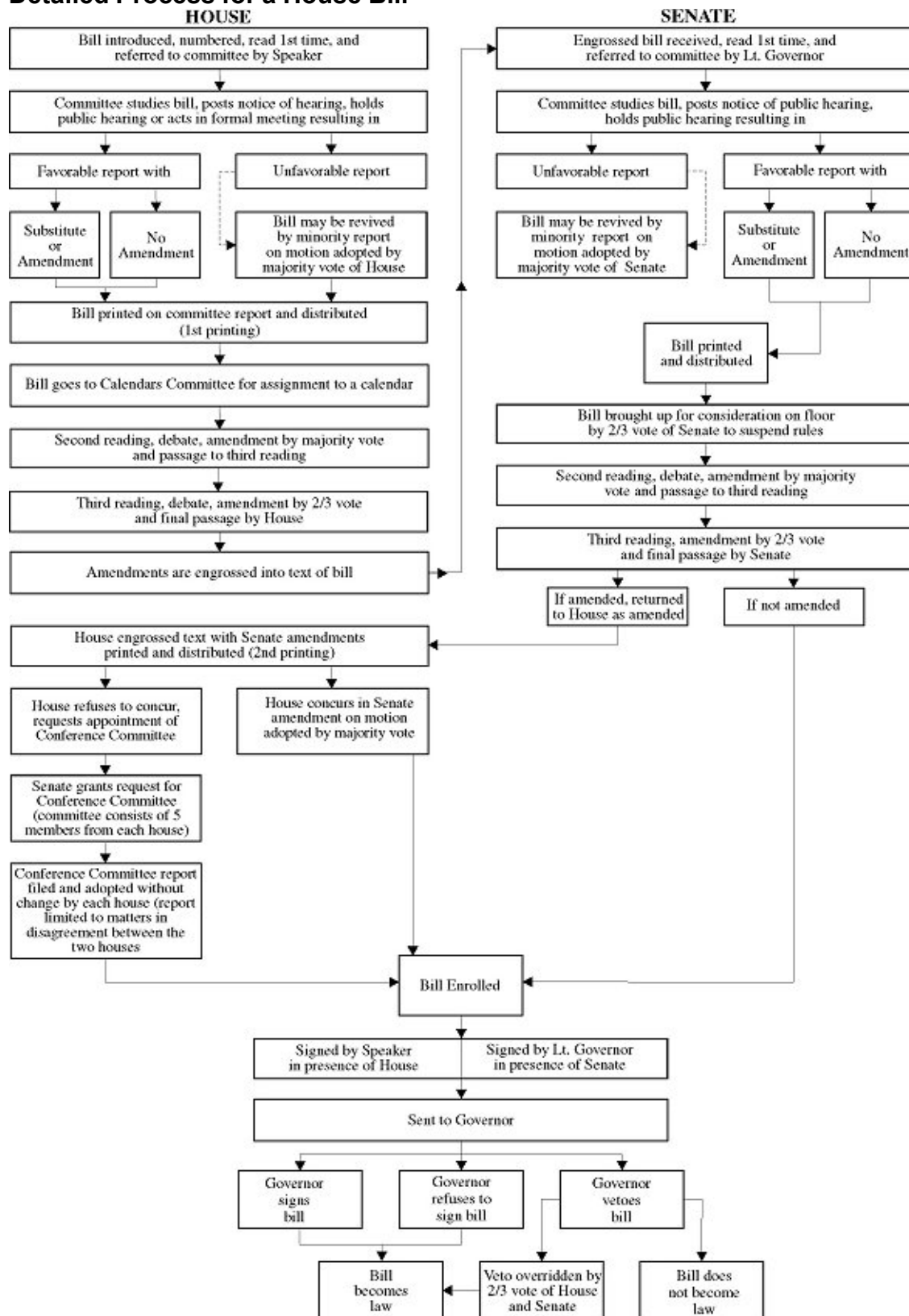
91st day following final adjournment - Date that bills without specific effective dates (that could not be effective immediately) become law.

## Detailed Process for a Texas Senate Bill



[www.tlc.state.tx.us/gtli/legproc/diagram\\_senate.html](http://www.tlc.state.tx.us/gtli/legproc/diagram_senate.html)

## Detailed Process for a House Bill



[www.tlc.state.tx.us/gtli/legproc/diagram.html](http://www.tlc.state.tx.us/gtli/legproc/diagram.html)

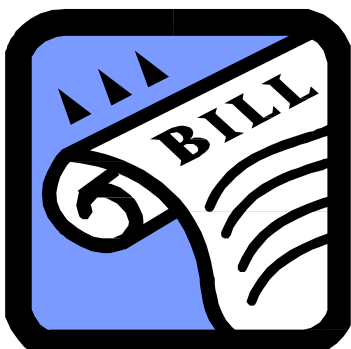
# TEXAS LEGISLATURE GLOSSARY OF COMMON TERMS

(Excerpted from *Citizens' Guide to the Texas Legislature*, <http://www.tlc.state.tx.us/gtli/glossary/glossary.html>)

**Advocacy:** Identifying a problem, proposing a solution and reaching a goal or building support to act on a problem to improve a situation for yourself or others.

**Legislative Advocacy:** Through persuasive reasoning, working to enact or change laws which will improve a situation for either a specific group or the general population.

**Bill:** A proposed law during session for consideration by the legislature.



## Designated Abbreviations for Texas State Legislation:

HB House Bill  
SB Senate Bill  
HCR House Concurrent Resolution  
SCR Senate Concurrent Resolution  
HJR House Joint Resolution  
SJR Senate Joint Resolution  
CSHB Committee Substitute House Bill  
CSSB Committee Substitute Senate Bill

## Types of Bills:

- **Local Bills:** Bills limited to a specific geographical area of the state, e.g., local government units such as cities, counties, school districts, precincts, etc.
- **Special Bills:** Bills directed toward a select, special individual or entity, e.g., for blind but not other disabled persons.
- **General Bills:** All other bills are "general" bills.

**Calendars Committee:** Schedules bills for floor debate in the House of Representatives. All favorably and unfavorably reported bills automatically go to the Calendars Committee. Many bills never arrive for floor debate and do not go beyond this point.



**Caption:** The first sentence of a bill which may summarize the scope and/or limits of a bill.

**Caucus:** (1) A closed meeting of a group of persons belonging to the same political party or faction to decide policy, choose candidates or promote certain causes. (2) To meet or hold caucus.

**Chubbing:** Discussion or debate for stalling purposes on House or Senate floor.

**Committees:** Groups of senators or representatives, who are appointed by their respective presiding officers, hear testimony and/or deliberate on pending legislation in specific areas, e.g., finance.

**Committee Substitute Bill (CSSB OR CSHB):** A way of amending a bill in committee which provides for total replacement of a bill with new language, but which is relevant to and within the constraints of the caption of a bill.

**Concurrence Votes:** If a bill passes one house and is sent over to the other house where it is amended, the sponsor in the originating house may opt to seek "concurrence." On a vote of concurrence, requiring a majority, the originating house may simply agree to accept the other house's amendments.

**Conference Committee:** Five senators (appointed by the Lt. governor) and five representatives (appointed by the speaker) form a committee to resolve differences between the two house versions of a bill. No new provisions are allowed to be added during conference committee proceedings without the express written instruction of both houses.

**Confirmation:** Gubernatorial appointees must receive a two-thirds vote of the Senate to be confirmed.

**Congress:** The body of elected members in the U.S. Senate and House of Representatives in Washington, D.C.

**Constituent:** A citizen residing within the district of an elected representative.

**Enacting Clause:** The Texas Constitution requires each bill, in order to be in effect, to contain an "enacting clause" which must read as follows: "Be it enacted by the Legislature of the State of Texas."

**Filibuster:** In Texas, a filibuster is allowed only in the Senate. A filibuster occurs when one senator holds the floor through talking or long speeches, without sitting down or leaving the vicinity of the senator's desk. Although the primary purpose of a filibuster is usually to kill a bill, sometimes this is also done to reach a compromise or to delay a vote as long as possible.

**Fiscal Notes:** One or more pages attached to a bill stating the estimated cost to the state and/or at the local level (city, school district, etc.) if the various provisions of the bill are enacted.

**Forums:** Public meetings for open discussion of issues.

**FY:** Fiscal Year, the annual state budget cycle beginning September 1 and ending August 31 of the following year.

**Hearings:** Legislative committees or agency boards/committees schedule meetings to hear public comment "testimony" on announced



topics, and generally relating to filed or planned legislation, or for agency rulemaking purposes.

**Intent Calendar:** The Senate calendar, a schedule of bills to be heard during a daily session.

**Interim Study:** During the months between regular sessions, members from both the House and Senate hold meetings and public hearings to study and make recommendations to the next legislature on a specific issue.

**Legislative Budget Board (LBB):** A board of 10 members (five each from the Senate and House, including the Lt. governor, speaker, and Chairs of designated committees) which recommends legislative appropriations for all state agencies.

**Legislative Council:** A support agency for both the Senate and House whose main responsibility is to draft and review bills before they are filed in order to provide accuracy and congruity with existing law.

**Legislative Day:** From opening to adjournment. This period may cover one, several or part of a calendar day -- which permits another "day" to be opened on the same calendar day.

**Line Items:** The state budget appears as a series of listed items and the amount appropriated for each, line by line. Each project or state-funded program and its funding level is listed, therefore, on its own "line," and is referred to as a "line item."

**Lobbyist:** A person who meets with legislators with the intent of influencing legislation. (Originally the term referred to persons who frequented lobbies or corridors outside legislative chambers waiting to speak with lawmakers.)

**Markups:** The Senate Finance Committee and the House Appropriations Committee each evaluate budget requests, line item by line item. Shifting of available funds occurs during "markup" sessions.

**Resolution:** A formal expression of the opinion or the will of members of the House or Senate, not a statutory expression.

**Regulation:** A rule or order which has the force of law, and is issued by a state agency or commission which has been given statutory authority to do so in implementing laws.

**Sine Die:** Latin for "without another day." Final adjournment of a regular or special session of the legislature.

**Statutes:** The compilation of all enacted laws.

**Testimony:** Comments made by individuals during a public hearing such as before a committee or board, and which becomes public record.



**Veto:** A governor's act which officially negates a piece of legislation, preventing the enactment of law. A veto may be overturned by a two-thirds vote of the membership in both the Senate and the House of Representatives.

**Voice Vote:** A vote during which the presiding officer will request the members who are voting in favor of a measure or motion to respond collectively by saying "aye" and those who are voting against the measure or motion to respond collectively by saying "nay".



# Roberts Rules of Order Basic Rev

Source: *Simplified Guide to Motions*



## Procedures for Handling a Main Motion:

- I. Obtaining and assigning the floor
  - A. Member rises and addresses the chair.
  - B. Chair recognizes
- II. How the motion is brought before the assembly
  - A. Member makes a motion.
  - B. Another member seconds motion.
  - C. Chair states motion.
- III. Consideration of the motion
  - A. Members debate motion.
  - B. Chair puts forth question and members vote.
  - C. Chair announces result of vote.

## Pertinent Facts Regarding Motions:

- A **main motion** brings business before the assembly.
- A **subsidiary motion** assists the assembly in treating or disposing of a main motion and sometimes of other motions.
- A **privileged motion** deals with special matters of immediate importance. It does not relate to the pending business.
- An **incidental motion** is related to the parliamentary situation in such a way that it must be decided before business can proceed.
- Rulings of the chair can be appealed.
- Before a motion has been stated by the chair, it can be withdrawn or modified by the maker. After being stated by the chair, it can be withdrawn or modified only by general consent or a majority vote of the assembly.
- Hasty or ill-advised action can be corrected through the motion to reconsider. This motion can be made only by one who voted on the prevailing side and must be made on the same day or next succeeding day after the original vote was taken (not counting a day on which no business meeting is held during a session).

## Process of Amending a Motion:

- To **insert** or to **add** (a word, consecutive words, or a paragraph)
- To **strike out** (a word, consecutive words, or a paragraph)
- To **strike out and insert** (which applies to word) or to **substitute** (which is not applied to anything less than a complete paragraph of one or more sentences).

## Forms of Voting

- A **voice vote** is the most commonly used form of voting.
- A **rising vote** is the normal method of voting on motions requiring a 2/3 vote for adoption. It is also used to verify a voice vote or a vote by show of hands. The chair can order a rising vote or a single member can call for a **division** of the assembly.
- A **show of hands** is an alternative for a voice vote, sometimes used in small committees **if no member objects**.
- A **count** can be ordered by the chair or by a majority vote of the assembly.
- **General consent** is a vote of silent agreement without a single objection.
- A **ballot** or **roll call** vote can be ordered by a majority.

## Ranking Motions

Motions are listed in order of their precedence, with the highest ranking at the top. After a motion has been stated by the chair, higher ranking motions are in order, but not lower ranking motions, except that

Amend and Previous Question can be applied to amendable and/or debatable motions of higher rank than themselves.

## Meaning of Column Headers and Symbols:

A – Can be amended.

D – Is debatable.

I – Is in order when another has the floor.

M – Requires a majority vote.

R – The vote on this motion may be reconsidered.

S – Requires a second.

2/3 – Requires a 2/3 vote.

+ – Usually no vote is taken. The chair decides.

# - A main motion when no other motion is pending.

- - No vote is taken. The chair responds.

\* - See Robert's Rules of Order Newly Revised for specific rule. Consult index.

\*\* - An incidental main motion which usually requires a majority vote with previous notice or a 2/3 vote without previous notice.

## (Columns Headers)

I = Interrupt

S = Second

D = Debate

A = Amend

V = Vote

R = Reconsider



Ranking Motions		I	S	D	A	V	R
<b>Privileged Motions</b>							
#	Fix the time to which to adjourn		S		A	M	R
	Adjourn		S			M	
#	Recess		S		A	M	
	Raise a Question of Privilege	I				+	
	Call for the Orders of the Day	I				+	
<b>Subsidiary Motions</b>							
	Lay on the Table		S			M	
	Previous Question (closed debate)		S			2/3	R
#	Limit or Extend Limits of Debate		S		A	2/3	R
#	Postpone to a Certain Time		S	D	A	M	R
#	Commit or Refer		S	D	A	M	R
#	Amend		S	D	A*	M	R
#	Postpone Indefinitely		S	D*		M	R*
<b>Main Motion</b>			S	D	A	M	R
<b>Non-ranking Motions</b>							
<b>Incidental Motions</b>							
	Appeal	I	S	D*		M*	R
	Close Nominations or Close the Polls		S		A	2/3	
	Consideration by Paragraph		S		A	M	
	Create a Blank		S			M	
	Division of the Question		S*		A	M*	
	Division of the Assembly	I				*	
	Objection to the consideration of a Question	*				2/3	*
	Parliamentary Inquiry	I				-	
	Point of Information	I				-	
	Point of Order	I		*		+	
	Reopen Nominations or to Withdraw a Motion		S		A	M	*
	Request for Permission to Withdraw a Motion	*	*			M	*
	Suspend the Rules		S			2/3*	
<b>Motions that Bring a Question Again Before the Assembly</b>							
	Take from the Table		S			M	
**	Rescind or Amend something Previously Adopted		S	D	A	*	*
**	Discharge a Committee		S	D	A	*	*
	Reconsider	*	S	D*		M	

## Eleven Levels of Advocacy Involvement

*Consider moving from the Level One, the lowest impact level progressively to more in-depth advocacy.*



### **Level One: Be Informed.**

One of the fastest, most efficient ways to get involved in any movement is through the Internet. Discover links to other organizations and what they are doing to promote their agenda.

#### *How to --Texas Legislative Online Contacting Members or Tracking Bills*

#### **How to Contact Your Legislators:**

- Using your web browser, go to <https://capitol.texas.gov>.
- In the rightmost column, under the “Who Represents Me?” heading, choose your desired method of search.
- Key the requested information; then click on Submit. The address method results in the most specific information.
- Clicking on a Texas State Legislature member’s name will take one to that member’s website, where there is a wide variety of information, ranging from contact info to press releases to bills authored by the member.
- The website contains links to send emails to the member. Other web pages have links to committees and other components of the total Texas State Legislature universe.

#### **How to learn about bills in progress:**

- Using your web browser, go to <https://capitol.texas.gov>.
- In the middle of the home page, locate Search Legislation—click on the current session.
- Then click on Bill List or Word/Phrase.
- Type in the pertinent information into the search area, click go.
- Information is linked to the tool bar that appears above the bill history information (bill text, author list, actions, amendments, captions and bill stages).
- If you search by a word/phrase, it will bring up a list of bills. The ‘relating to’ sentence tells a bit about each bill. Status is also indicated.
- Clicking on the bill number takes one directly to the bill to read the bill text.

## Setting up My TLO (My Texas Legislature Online) bill tracking:

- Click on Track Legislation with Bill Lists
- Click on Account Options: New User?
- Provide e-mail address and create a password. Submit.
- Current Session Legislature category should appear, if not, select it.
- Type in the bill name (HB ### or SB ###) with a brief description.
- Click on create.
- If you pull down “Selected Bill List” tab from the tool bar, insert the appropriate information and it will provide you a bill list. Follow the instructions as directed.
- If you want e-mail alerts, click below My TLO on “Receive Bill & Meeting Alerts”.
- Provide the requested information, click the appropriate category or feed.
- Finished and it is a free subscription!

**Texas Elected Official Directory:** [www.texastribune.org/directory/](http://www.texastribune.org/directory/)



### Level Two: Find Out Who Represents You.

An important step in becoming an advocate is knowing who represents you at the local, state, and national levels. They want to hear from you!

***Are you registered to Vote?*** Find out at: call 1-877-452-9060 or <https://teamrv-mvp.sos.texas.gov/MVP/mvp.do>.

***To register to Vote:*** Pick up an official application at your local post office or online at [www.votetexas.gov/register-to-vote/](http://www.votetexas.gov/register-to-vote/).

**Find Out Who Represents You:** A fast and easy way to find out who represents you is to visit <https://capitol.texas.gov> and type in your address in far-right labeled section.

Learn about your legislative members at: <https://capitol.texas.gov>.

Navigate to the Texas House and Texas Senate web pages. There you will be able to look up your legislator. You may also contact your legislator’s office and request information.

**Good Things to Know about Legislators:** What political issues are important to them? What committees do they sit on? What is their personal background?



### Level Three: Share Your Story.

Use your stories to build a stronger voice for your issue. Stories can be as short as a page or as long as you like. In your own words discuss how the issue affects your family’s life, or how it impacts your community, or both. If necessary, change the names of people in your story in order to protect their privacy. Include your contact information with your letter. Your legislator may want to speak with you more about your story. Use

your story to let leaders know why you think your issue is important for the future of Texas families. If you have any stories about community partnerships, leaders may want to know about how partnerships and systems integration work throughout Texas.



#### **Level Four:** Make the Community Connection.

Connecting to the community means talking to people. Do you make connections at work, at church, in your neighborhood, other organizations with a common mission, or via social internet networks? All of these interactions are opportunities to connect. Connecting to the community becomes a powerful tool when you bring people in on the issue.



#### **Level Five:** Communicate with Your Legislator.

One of the best ways to communicate with legislators is face-to-face, but arranging a meeting is not always a possibility. Letters, e-mails, and telephone calls can be just as effective and inform legislators about your position and what action you would like them to take on your behalf.

Letters to legislators can be effective when:

You are initially trying to build support for an issue.


- You want him or her to take a position or act on an issue or to reverse a position he/she has taken.
- A vote on a bill of importance is pending.
- The legislator is undecided about an issue.
- You want to follow up a personal visit to outline what you heard him/her say and/or commit to.

*Write a letter to your legislator.* Letters are an effective and essential form of communicating how you feel on an issue with officials.

- A personalized, hand-written letter can really attract attention. Avoid making a letter sound “mass produced”.
- Try to keep your letter short and simple. One page is best.
- Be specific and clearly state why you are writing, what you want the legislator to do, where and when.
- If writing about a specific bill, indicate the bill's number, title, author, and the committee to which it has been assigned.
- Provide reasons for your position on the issue or bill.
- Use statistics sparingly and carefully. Attach supporting information rather than including it in the body of the letter.
- Thank them for their attention to the letter and request an answer to your letter.

- Remember that personal stories work best. Tell him/her how the issue affects your clients, your family, or community.
- Send letters regular mail, but if under time constraints, fax the letter.
- You want to say thank you - personal visit, support of an issue, action taken. (Remember to write thank you letters to staff members who help you, with a copy to the legislator.)
- Include your full name and address.

It is important to address letters correctly, using the following salutations and address formats:

 <p><b>Governor:</b> The Honorable (Full Name) Governor of Texas State Capitol P.O. Box 12428 Austin, Texas 78711-2428 Dear Governor (Last Name):</p>	<p><b>Lieutenant Governor:</b> The Honorable (Full Name) Lieutenant Governor of Texas State Capitol P.O. Box 12068 Austin, Texas 78711-2068 Dear Governor (Last Name):</p>	<p><b>Speaker of the House:</b> The Honorable (Full Name) Speaker of the House Texas House of Representatives P.O. Box 2910 Austin, TX 78768-2910 Dear Mr./Madam Speaker:</p>
	<p><b>Senator:</b> The Honorable (Full Name) Texas Senate P.O. Box 12068, Capitol Station Austin, TX 78711 Dear Senator (Last Name):</p>	<p><b>State Representative:</b> The Honorable (Full Name) Texas House of Representatives P.O. Box 2910 Austin, TX 78768-2910 Dear Representative (Last Name):</p>

## Send an E-mail

E-mail is the quickest, easiest way to communicate with your legislator.

- Put your position in the subject line.
- Keep your message short and concise.
- Does not use e-mail to overwhelm a legislator's inbox. If you do, chances are the communications will be ignored.
- Use standard punctuation, spelling, and capitalization as you would in a standard letter.
- It is not the best idea to send a letter as an attachment in an email.
- Some possible alternative uses for e-mail include:
  - Sending "action" alerts to groups of advocates;
  - Contacting a legislative staff member with information on issue development;
  - Sharing information on an issue with other agencies or groups interested in similar issues; or
  - Sending notices for public hearings or issue meetings to participating advocates.

**For House members and their staff, the general e-mail address format is:**

Firstname.lastname@house.texas.gov Example: john.smith@house.texas.gov

**For Senate members and their staff, the general e-mail address format is:**

Firstname.lastname@senate.texas.gov Example: john.smith@senate.texas.gov

## Summary of Written Effective Communication Key Elements

The key to effective advocacy is "be prepared". Prepare your message ahead of time. Develop a one to two page "fact sheet" for each priority issue, which includes:

- **Recommendation:** A one-sentence statement.
- **Background:** One paragraph that concisely states the issue background and why it is a problem. Use key statistics, but sparingly.
- **Impact Statement:** State what impacts your recommendation could have on the state or the legislator's district.
- **Supporters:** List supporting organizations, agencies, etc. Do not list names of individuals unless they are well-known and credible to the legislator.
- **Contact Person:** Clearly indicate who should be contacted if further information is needed or there are questions. Include the person's contact information; it is important that the key contact be easily accessible and knowledgeable about the issue.

## Make the Telephone Call

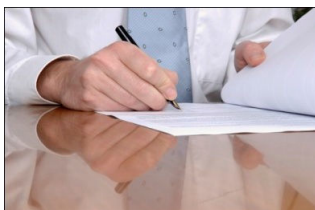
Phone calls do not substitute for the more personal contact of visits; however, they can be useful. Make notes in advance about the points you want to make and then make the call when:

- Time is of the essence, e.g., an upcoming vote on legislation.
- Identify yourself, including your hometown and any affiliations that are relevant.
- Be sure to mention if you live in the legislator's district.
- Explain why you are calling. If it is about a piece of legislation, identify it by its bill number and issue area.
- Offer 1 or 2 brief talking points and offer local examples if possible.
- The call will only last 2 minutes so be concise about your message.
- Provide your contact information (name, full address, zip code, email, phone number).
- Calls to the capital office have more impact than call to the district office unless legislators are home in their district on recess.
- Thank the staff member for his or her time.



### Level Six: Organize a Letter Campaign.

Letter campaigns are organized efforts to deliver the voice of your community to legislators. Letter campaigns are effective for two reasons. First, letters can get the message to leaders that your community thinks your issue is an important issue. Second, letter campaigns can help you gain support in your community. People who would otherwise remain quiet may be willing to send a letter to a legislator if they know they have your support and guidance. Organizing a letter campaign can be interesting and fun. These tips should give you some help in organizing one of your own in your community.



## Steps to Organize a Letter Campaign

### Creating a Web-base campaign:



If you have a computer and access to the Internet, you can conduct a letter campaign through email. Email your friends and neighbors with a sample letter for them to send along to their legislators or to use as a guide.

### Creating a Community-base campaign:

**Pick a location for your campaign.** You could host an event at your house. Your event could take place in front of a local business such as a grocery store. Make sure that wherever you host the event, you have permission to do so.

**Make sure you have what you need.** Prepare a sample letter that is clear and to the point. Bring many copies of the sample letter. Some participants will want to use it as a guide in writing their own letter, but others will just want to sign a copy of your letter to mail. You will need plenty of paper, pens, envelopes, and stamps (you can ask for donations to cover the cost of stamps). You will need a good table and chairs for yourself and for participants. Make sure you have all the legislative addresses you need.

**Use the opportunity.** Be prepared to discuss the issue you are asking people to write about. Know about the legislators you are asking participants to write to. Create fact sheets and other literature to hand out to participants. Mail the letters.

**Keep the connection.** Collect participants' phone numbers or email addresses and thank them for their efforts. Ask participants if they would like to hear about other events.



### Level Seven: Connect Legislators to Local Efforts.

One of the most effective ways to demonstrate the importance of your issue to elected leaders is to personally invite them to see what occurs on a daily basis in a variety of settings. Legislators like to connect with their voters. Follow this step-by-step guide to successfully bring a legislator to your community program.

#### Plan an Event:

Partner with others to plan an event in your community. Consider hosting your event on an important holiday or a child/family related occasion. Examples of events include: A tour of an early care and education facility, the opening of a new facility, a PTA meeting, or a holiday celebration.

**Make the Invitation:**

Work with your legislator's staff to find good dates for the event. Even if you confirm a date, you should formally invite the legislator with a letter from you and others hosting the event. Include a description of the event.

**Use the Media to Maximize Attention:**

Call local media to let them know about the event. Prepare a press packet to inform the media. At the event create photo opportunities for the legislator.

**Bring a Crowd:**

Invite business and community leaders to your event, including city council members and school board members. Invite families to the event. Advertise the event locally.

**Bring in Experts:**

Contact child/family professionals to bring experts to the event to interact with the media. Designate a leader or identified staff member to interact with the media and provide him or her with informative talking points.

**Get out the Message:**

Provide talking points to all who plan to interact with the media or the legislator. Choose one informed person to answer the legislator's questions.

**Evaluate and Celebrate:**

After the event, reflect with participants about what went well and what could be improved upon for your next event. Be sure to write a thank you letter to the legislator and any leaders, parents, or experts that participated in your event. Pat yourselves on the back for pulling off a legislative event!

**Level Eight: Work with the Media.**

Working with the media can be an excellent way to raise awareness about early care and education. Leaders monitor the media and tend to respond to its messages. Whether you come to a legislative event in Austin or you organize an event in your community, the media may want to work with you. Anyone can work with the media, and if you are fortunate to have the opportunity to do so, consider these strategies.

**When speaking to media professionals:**

Remember that most media professionals are under deadlines and want succinct, understandable information. If a reporter contacts you, try to get back to him as soon as possible. Know in advance 3-4 important points you want to make. Feel free to ask a reporter if you can start over if you make a mistake. Stick to your points. The reporter will ask for more information if he or she needs it. Keep your cool in answering confrontational questions. If you don't know the answer to something, just be honest and refer the reporter to another source. Be yourself! Be friendly!

## Letters to the Editor:

Letters to the Editor are quick and easy ways to get your message in print and out into the community. It is best to respond to a timely event or article; be sure to mention the article in your letter. Keep your letter short. Most papers only ask for 250 words. Support your point of view with personal experience or relevant data. It is a good idea to double check grammar and spelling. Mistakes can keep your letter out of the paper. Find and follow the newspaper's instructions for submitting a Letter to the Editor; these can generally be found on the newspaper's website.



## Level Nine: Visit Your Legislator.

Whether it is in the Texas Capitol or in a district office, making a visit to a legislator's office can have a great influence on how leaders think about issues. A legislative visit is an opportunity to supply leaders with valuable information and data about early care and education. The willingness to make a visit to a legislative office tells leaders how important early care and education is to you and your community.

## Find Out Who Represents You:

You will want to meet with legislators from your district. You can find out who represents you at <https://capitol.texas.gov> and type in your address in far-right labeled section.

## Get to Know Your Legislators:

Prior to your visit, be sure to find out more information about your legislators. For example, find out current issues most important to them, the committees they sit on, and what they have supported in the past.

## Making the Personal Visits

Personal meetings with legislators and their staff members are the most effective way to get your message across. You can meet with them in Austin or their home district offices. You can also invite them to public forums, member meetings or to tour your organization.

## Some important rules to remember for personal visits include:

- Be sure to make an appointment as far in advance as possible. **Note:** Even if you try and make an appointment, you may still be unable to meet with the legislator directly. Therefore, you will be meeting with his or her staff. This meeting can be just as effective as meeting with the legislator directly.
- Ask the aide how long the legislator usually takes in routine appointments; generally, it is safe to assume you will have anywhere from five to ten minutes.
- Arrive early, but be prepared to wait.

- Introduce yourself and whom you represent. If applicable, legislators are very interested in what is going on in their districts. Share information about your community's children, family and education efforts.
- If you are part of a group, choose a spokesperson for the group, or agree on a speaking order. Others may provide additional information, if necessary.
- Avoid using acronyms and "buzzwords".
- Be clear and specific about what the desired action is from the legislator (act on a bill, support increased funding, etc.).
- Do not overload them with too much information.
- Provide summaries of lengthy reports with information about how to obtain the full report if needed.
- Be prepared to answer questions and talk about both sides of an issue so that the legislator can anticipate and prepare for the opposition if necessary. If you do not know the answer to a question, offer to get back to the individual with the information and then do so promptly.
- Always provide information that is accurate.
- Explicitly ask for action.
- Only one action request per visit.
- Take the one page fact sheet about the issue and leave it with the person who met with you.
- Offer to check back later for an answer to your request, if they would like time to study the issue and your fact sheet further.
- Follow up with a letter thanking them for their time and what they agreed to do. Be sure to again provide any materials or information to the legislator or staff member that you said you would during the meeting. Also include a note of thanks in appreciation of the legislator's time.



## Level Ten: Testify at the Capitol.

Before bills become law, legislative committees invite public testimony for consideration on any proposed legislation. Providing testimony on a bill is a powerful method to be heard on issues. This is an opportunity for you to supply legislators with key information on a specific piece of legislation. It is also an opportunity to speak directly with legislators. Your testimony shows leadership, commitment to the issue, and your personal investment in the bill's outcome.



## How to Testify

The Texas Legislature invites all who are interested to offer testimony on bills through two methods: 1) submitting written testimony and 2) addressing the committee. Both methods require similar steps, but the House requires electronic kiosk information entry:

- Know the date, time, and location of the committee hearing (check <https://capitol.texas.gov/MnuCommittees.aspx>).
- See the House Witness Registration website for more information: <https://mytxlegis.capitol.texas.gov/hwrspublic/about.aspx>

- Arrive early to the committee hearing and fill out a (Senate) statement form, which includes your identification information.
- On the form, indicate whether you support or are against the bill you plan to provide testimony for. Also indicate if you would like to address the committee or submit written testimony only.
- Senate statement forms are generally at the back of the room. Be sure the committee clerk receives your completed form.
- If you have any accompanying information or would like to provide enough copies of your testimony for each committee member, submit this information with your completed form.
- If you are submitting written testimony only, you may leave. If you plan to address the committee you must wait to be called by the Committee Chair.

## Keys to Effective Verbal Testimony

It is helpful to know your topic; give yourself time to prepare. Present your verbal testimony in three minutes or less. Try not to **read** your testimony. State who you are, whom you represent and what your position is on the identified issue or bill.

- Your voice is what matters; don't worry about jargon or technical terms.
- Be respectful and professional –direct replies to all committee members.
- If you have submitted written testimony, do not read your testimony to the committee; speak candidly, but concise, about your views on the legislation. Do not make claims you cannot defend.
- Identify your concerns and how you think the committee could make improvements to the bill, if appropriate.
- Restate your main point at the end of your testimony or what you would like to see accomplished.
- Don't worry if you are asked a question you do not know the answer to. Just say you do not know and offer to follow up later with that information.
- Thank them for their time and consideration of your position.

## Outline for Legislative Testimony

"Good morning/afternoon/evening committee members."

### **Introduction:**

- I am
- Who you represent.
- If speaking to a bill, give number and title of bill.
- Do you support or oppose the bill?

### **Statement of the Issue:**

#### ***Present the issue-***

- Does something need to be changed?
- What is your personal or professional perspective?
- Who will be affected, and how will they be affected by the change?
- How are you affected? Is your community effected?



***Present a solution-***

- What do you want?
- How does the bill bring about this solution/impede the solution?

**Conclusion:**

- Restate the issue.
- Restate your preferred solution.
- Ask for their support (or vote).
- Thank the legislators for their time.

## Public Hearings and Testimony

The purpose of a public hearing is to give individuals and groups an opportunity to express their opinions to state agencies or legislators. A legislative committee or task force may schedule a public hearing before, or during, a legislative session. The hearing may be specific to a particular bill or to several bills that the committee is considering. Most public hearings are held in Austin and notice of the hearings is published on the appropriate website.



It is helpful, particularly during a legislative session, to subscribe to the email notification service of the committees most likely to be assigned bills of interest to you. You will then receive notification of any public hearings scheduled by the committee. During the legislative session, notice of a public hearing for a bill may be less than 48 hours, so it is important to prepare your testimony ahead of time and be prepared to respond quickly.

Hearings can also be sponsored by agencies, such as the Texas Health and Human Services Commission, as they prepare their state budget appropriations request or during the rule-making process.

You should consider providing testimony at a public hearing when you are knowledgeable about an issue and are prepared to answer questions, or when you have personal experience with an issue or have researched it thoroughly.

An alternative to providing testimony is to fill out a Senate testimony card stating that you support or oppose an issue or bill, but do not wish to verbally testify. You can also indicate on the card that you are there in support of the testimony that will be provided by an individual or group whose position on the issue is the same as yours. The House provides several kiosks for you to electronically sign up and then register your position without providing oral and/or written testimony.

Prepare two versions of your testimony: one to deliver verbally and a longer, written version to give to the legislators. The written version should be typed on your letterhead. Take at least 20 copies for committee members and clerk.

## Written Testimony

The written version you submit to the Committee should be on your letterhead and one page with two sections. The first section should say who you are and whom you represent. The second section should briefly state why you support or oppose the item. If necessary, attach supporting materials, but keep them brief.

### Content:

- Identify your concerns and how you think the committee could make improvements to the bill, if appropriate.
- If the legislation is a carefully worked out compromise among several groups, acknowledge this.
- If you have information that explains the effect the legislation could have on each committee member's district, state this. Address each committee member by name.
- At the end of your testimony, state what you would like to see accomplished.
- Offer to answer any questions committee members may have; if you do not know the answer to a question, state that and offer to get a response and follow up with committee members as soon as possible. Do not forget to follow up.
- Be respectful and professional - direct replies to all committee members.
- Offer to assist them and their staff in any way you can to resolve the issue.
- Thank them for their time and consideration of your position.



### Level Eleven: Become a Direct Action Organizer.

You plan a strategy for an organization to address an issue. The issue needs to be one that a majority of people will support and is based on the power of the people to take collective action on their own behalf, which will not be actively opposed by organized groups with larger numbers.



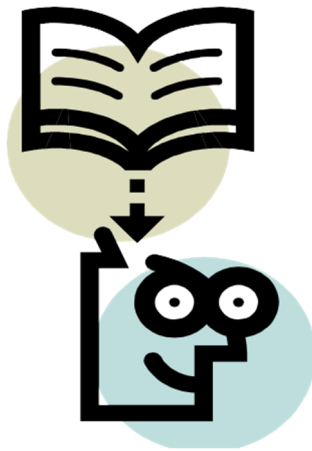
### Issue Analysis, Action Plan Development, and Implementation Activity Tool

It is important not to rely on vocal people or the news media to tell you what concerns people in your organization or community. Become aware of what people talk about and what is happening in the community.

Issues grow out of accumulated daily events – concerns people talk about, worries expressed by organization members, friends, neighbors, business people and those in government. Their dialogue projects that, “Something is wrong and something needs to be done about it.”

## Issue-Analysis Process

The issue-analysis process offers a way to dig beneath the surface symptoms of a situation and identify the real issue to be resolved. Our focus is to gather information and analyze possible outcomes from many points of view in order to facilitate consensus on a desired course of action.



The “**5 I’s of Policy Analysis**” as an organizing tool:

- ☐ Information- the facts
- ☐ Issues- identify specific issue
- ☐ Impact- what are the consequences
- ☐ Implications- what possible effect
- ☐ Imperatives-what are we going to do about it!

Defining the problem is a big challenge in starting the public policy problem solving process. A public problem in one situation may not be a problem in another situation. A solution that works well in one situation may not work at all in another. Public policies affect families in both positive and negative ways. Issues are complex. It is necessary to find ways to judge community support and interest

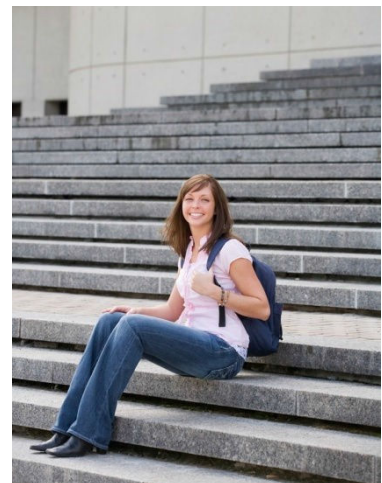
in the problems.

So, for public policy problem solving to occur, you must analyze what is happening and why people react as they do. First, focus on steps for analyzing public policy issues, then go through steps for planning a course of action for being involved in public policy decision making. Individual action can make a difference in issues that shape our future.

The issue-analysis process offers a way to dig beneath the surface symptoms of a situation and identify the real issue to be resolved. The focus is to gather information and analyze possible outcomes from many points of view in order to facilitate consensus on a desired course of action.

There are seven steps in the process:

- 1. Define the Issue**
- 2. Identify the Interested Parties**
- 3. Gather Perspectives**
- 4. Analyze Viewpoints**
- 5. Form a Position**
- 6. Make an Action Plan (DAO)**
- 7. Take Action**



The Direct Action Organizing Strategy Plan further describes the process to develop a plan to resolve an issue. The following Direct Action Organizing Strategy Plan describes the process. Your collective power has to be equal to your demands, and your tactics must have a direct cost to your target.



## Direct Action Organizing (DAO) Strategy Plan

Adapted from Glisen Leadership Training Institute & Midwest Academy

### Issue/Campaign:

Goals	Organizational Considerations	Constituents, Allies & Opponents	Targets (Decision-makers)	Tactics (Activities)
<p>1. List the long-term objectives of your campaign.</p> <p>2. State the intermediate goals for this issue campaign. What constitutes a victory?</p> <p>How will the campaign:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Win concrete improvements in people's lives?</li> <li><input type="checkbox"/> Give people a sense of their own power?</li> <li><input type="checkbox"/> Alter the relations of power?</li> </ul> <p>3. What short-term or partial victories can you win as steps toward your long-term goals</p>	<p>1. List the resources that your organization brings to the campaign. Include: money, # of staff, facilities, reputation, canvass, etc.</p> <p>What is the budget? Including in-kind contributions for this campaign?</p> <p>2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand leadership group</li> <li><input type="checkbox"/> Increase experiences of existing leadership</li> <li><input type="checkbox"/> Build membership base</li> <li><input type="checkbox"/> Expand into new constituencies</li> <li><input type="checkbox"/> Raise more money</li> </ul> <p>3. List the internal problems that have to be considered if the campaign is to succeed.</p>	<p>1. Who cares about this issue enough to join or help the organization?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Whose problem is it?</li> <li><input type="checkbox"/> Into what groups are they already organized?</li> <li><input type="checkbox"/> What do they gain if they win?</li> <li><input type="checkbox"/> What risks are they taking?</li> <li><input type="checkbox"/> What power do they have over the target?</li> </ul> <p>2. Who are your opponents?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What will your victory cost them?</li> <li><input type="checkbox"/> What will they do/spend to oppose you?</li> <li><input type="checkbox"/> How strong are they?</li> <li><input type="checkbox"/> What power do they have over the target?</li> </ul>	<p>1. Primary Targets: A target is always a person. It is never an institution or an elected body. There can be more than one target, but each need a separate strategy chart as your relationships of power differ with each target.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Who has the power to give you what you want?</li> <li><input type="checkbox"/> What power do you have over them?</li> </ul> <p>2. Secondary Targets (You don't always have nor need secondary targets.)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Who has the power over the people with the power to give you what you want?</li> <li><input type="checkbox"/> What power do you have over them (the secondary target)?</li> </ul>	<p>1. For each target list the tactics that each constituent group can best use to put pressure on the target to win your intermediate or short-term goal?</p> <p>Tactics must be:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> In context</li> <li><input type="checkbox"/> Directed as a specific target</li> <li><input type="checkbox"/> Backed up by a specific form of power</li> <li><input type="checkbox"/> Flexible and creative</li> <li><input type="checkbox"/> Make sense to the membership</li> </ul> <p>Tactics include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Media events</li> <li><input type="checkbox"/> Actions for information and demands</li> <li><input type="checkbox"/> Public hearings</li> <li><input type="checkbox"/> Voter registration and education</li> <li><input type="checkbox"/> Accountability sessions</li> <li><input type="checkbox"/> Negotiations</li> <li><input type="checkbox"/> Elections</li> <li><input type="checkbox"/> Lawsuits</li> <li><input type="checkbox"/> Strikes</li> </ul>



Texas Advocacy Playbook -37

# RESOURCES



## State of Texas

- Texas Governor: [www.gov.texas.gov](http://www.gov.texas.gov)
- Texas Lieutenant Governor: [www.ltgov.state.tx.us](http://www.ltgov.state.tx.us)
- Texas State Senate: [www.senate.state.tx.us](http://www.senate.state.tx.us)
- Texas Senate Research Center bill analysis: <https://senate.texas.gov/src-ba.php>
- Texas State Senate Rules: <https://senate.texas.gov/rules.php>
- The Texas State Senate Citizen Handbook: [www.senate.state.tx.us/assets/pdf/Citizen\\_HBook\\_Web\\_2015.pdf](http://www.senate.state.tx.us/assets/pdf/Citizen_HBook_Web_2015.pdf)
- Texas House of Representatives: <https://house.texas.gov/>
- Texas House of Representatives Rules and Precedents of the Texas House: [https://house.texas.gov/\\_media/pdf/hrrules.pdf](https://house.texas.gov/_media/pdf/hrrules.pdf)
- House Research Organization (Texas House of Representatives): <https://hro.house.texas.gov/>
- Texas Legislature Online: [www.legis.state.tx.us](http://www.legis.state.tx.us)
- Texas Legislature Online: <https://capitol.texas.gov>
- Texas Legislative Budget Board: [www.lbb.state.tx.us](http://www.lbb.state.tx.us)
- Texas Legislative Council: <https://tlc.texas.gov/>
- Texas Legislative Handbook: [www.txdirectory.com/catalog/](http://www.txdirectory.com/catalog/)
- My Texas Legislature Online: (offers personalized viewing of legislative content): <https://capitol.texas.gov/>
- Legislative Reference Library: <https://lrl.texas.gov/>
- The Texas Administrative Code: <https://www.sos.texas.gov/tac/index.shtml>
- Texas Statutes: <https://statutes.capitol.texas.gov/>
- Texas Register: [www.sos.state.tx.us/texreg/index.shtml](http://www.sos.state.tx.us/texreg/index.shtml)
- Texas Ethics Commission: Lobbying in Texas - A Guide to the Texas Law (Revised Sept. 15, 2015): [www.ethics.state.tx.us/guides/LOBBY\\_guide.htm](http://www.ethics.state.tx.us/guides/LOBBY_guide.htm)
- Texas Health and Human Services Commission: [www.hhsc.state.tx.us](http://www.hhsc.state.tx.us)
- Kids' House-Texas House or Senate: <https://kids.house.texas.gov> or <https://senate.texas.gov/Kids/HomeNoSW.htm>

## Internal Revenue Service

- IRS Publication 557 (Revised June 2008) Tax-Exempt Status for Your Organization: <https://www.irs.gov/forms-pubs/about-publication-557>
- Tax Information for Charities & Other Non-Profits: <https://www.irs.gov/charities-non-profits>

## Other Resources

- Alliance for Justice (Nonprofit Advocacy Legal Network): [www.afj.org](http://www.afj.org)
- American Association of Family & Consumer Sciences Public Policy Toolkit: <https://www.aafcs.org/resources/advocacy/tools>
- Annie E. Casey Foundation: [www.aecf.org](http://www.aecf.org)
- Center for Public Policy Priorities: [www.forabettertexas.org](http://www.forabettertexas.org)
- Center on Budget and Policy Priorities: [www.cbpp.org](http://www.cbpp.org)
- Gay Lesbian & Straight Education Network: [www.glsen.org](http://www.glsen.org)
- Independent Sector: <https://independentsector.org/resources/>
- League of Women Voters Texas: [my.lwv.org/texas](http://my.lwv.org/texas)
- National Council on Family Relations: <https://www.ncfr.org/about/ncfr-statement-policy>
- National Council of Nonprofits: [www.councilofnonprofits.org](http://www.councilofnonprofits.org)
- Texas Public Policy Foundation: [www.texaspolicy.com](http://www.texaspolicy.com)
- The Community Tool Box is a service of the Work Group for Community Health and Development at the University of Kansas: <https://ctb.ku.edu/en/table-of-contents>
- The Nonprofit Audit Guide: [www.councilofnonprofits.org/nonprofit-audit-guide](http://www.councilofnonprofits.org/nonprofit-audit-guide)
- USA.gov for starting a Non-profit: [www.usa.gov/start-nonprofit](http://www.usa.gov/start-nonprofit)

# Five Ways I Can Be an Advocate

List from your personal experience ways you have been or could be a personal, family or community advocate. List Lowest Intensity to Highest Intensity (Hint - - start list from top down).

Lowest 1)



2)



3)



4)

Highest  
Intensity 5)

## What Problem Could You Identify for Advocacy?

Identify a problem that requires a change in public policy or a problem that can be addressed through legislation. Once people in a group identify a problem, they must agree on a solution to the problem and how to obtain the solution. The problem then becomes an issue. **An issue is a specific solution to a problem that advocates choose to work on.**

Consider:

- Can the issue bring diverse groups together in support of the issue?
- Does data exist to show that achieving the policy change will improve the situation?
- Is the objective achievable even with opposition?
- Is the issue easy to understand?
- Will working on the issue provide people with opportunities to learn about and become involved with the decision-making process?
- Does the issue really address the problem?



**The PROBLEM:**

**POSSIBLE SOLUTION & WHO MAKES THE DECISION** (target & secondary target):

**CHALLENGES:**

**ANY ORGANIZED GROUPS WITH SIMILAR FOCUS FOR COLLABORATION:**

**TALKING POINTS:**

- General statement & why is this important?
- How has this impacted you/your group and/or community?
- Solution cost?
- No action cost?
- Will the proposed solution impact other areas?

**ACTIVITIES/ TACTICS** for creating awareness & solution commitment

**RESOURCES REQUIRED** for strategies & activities:

**TIME INVOLVED** (communication, creation & production of materials, networking, research):

*Advocates who attempt to fix everything run the risk of changing nothing in the process.*



***Never doubt that a small group of thoughtful,  
committed citizens can change the world.***

***Indeed, it is the only thing that ever has.***

***Margaret Mead***