



Conducting Candidate or Issue Forums

The following pages are to help give your PTA the tools necessary to hold a candidate or issue forum for your school district or area.

What is a forum?

A forum is a public meeting or assembly for open discussion.

At a candidate forum, speakers answer questions directly from audience members, panelists, or a moderator, but do not directly engage with each other. Speakers may be on stage simultaneously, or at separate times.

If your format requires a moderator, you may consider a person that is not associated with a political interest group so as to provide a neutral and objective position. Organizations such as The League of Women Voters, American Association of University Women, or other community group that is familiar with the issues and candidates may be better qualified to ensure the forum is noncommercial, nonsectarian, and nonpartisan.

Candidate and Issue forums are conducted to:

- Inform the public
- Provide the public an opportunity to hear the candidates discuss important issues
- Provide candidates with information that concerns their constituents
- Help voters make informed decisions
- Get candidates on the record so they can be held accountable for their stated positions on issues
- Provide an opportunity for candidates to get their message out to the voters
- Provide an important public service

Why should your PTA conduct a candidate or issue forum?

The answer is found in the mission and purposes of PTA:

PTA is

- *A Powerful voice for all children*
- *A Relevant resource for families and communities, and*
- *A Strong advocate for the education and well-being of every child*

The Do's and Don'ts

Nonprofits and Elections: Where the Legal Lines are Drawn

<i>Do's</i>	<i>Don'ts</i>
<p><u>Voter Registration...if nonpartisan</u></p> <p>Do</p> <ul style="list-style-type: none"> • Not be biased for or against any candidate (e.g., can't target likely Democrats or Republicans, conservatives or liberals) • You can target in nonpartisan ways: <ul style="list-style-type: none"> • Areas or people the nonprofit serves • Low-turnout areas (including low-income populations, minority populations, students) 	<p>Don't <u>Endorse (or favor) a candidate or political party</u></p> <ul style="list-style-type: none"> • Endorse, publish written or make oral statements supporting, or distribute materials (proactively or passively) supporting a candidate • Rate candidates in any way • Publicize which candidates share the nonprofit's views • Target voters who would support a candidate for registration or turn out the vote
<p><u>Voter Education...if nonpartisan</u></p> <p>Do</p> <ul style="list-style-type: none"> • Educate the public about issues, and even the issues of importance to the nonprofit • Educate candidates, too • Conduct nonpartisan candidate debates • Publish results of nonpartisan candidate questionnaires 	<p>Don't <u>oppose (or slight) a candidate or political party</u></p> <ul style="list-style-type: none"> • Endorse, publish written or make oral statements supporting, or distribute materials (proactively or passively) supporting a candidate • Rate candidates in any way • Publicize which candidates share the nonprofit's views • Target voters who would support a candidate for registration or turn out the vote
<p><u>Voter Participation...if nonpartisan</u></p> <p>Do</p> <ul style="list-style-type: none"> • Get-out-the-vote and PTA Voter drives, • Share information about polling locations, importance of voting, etc. • Do same items on voter registration list 	<p>Don't <u>Use nonprofit resources (money, time, facilities, contact lists, coordination of activities, etc.) for /against any candidates</u></p> <ul style="list-style-type: none"> • Fundraise for a candidate • Let a campaign use phones for phone banks • Give employees paid time off to campaign
<p><u>Normal Activities</u></p> <p>Do</p> <ul style="list-style-type: none"> • Nonprofit may continue to lobby and engage in its other regular advocacy activities 	
<p>Do <u>Seek Legal advice if you have any questions</u></p> <ul style="list-style-type: none"> • Consult a nonprofit law attorney 	

Do be Neutral and Objective

Don't Favor or Slight



School Board Elections

Who Can Be A Candidate?

Any citizen who is a registered voter and lives in the school district area he/she will represent may run as a candidate.

A portion of each local school board is elected in each odd-numbered year and information on which areas have elections is available from your county clerk or the school district offices. **Local school board elections are nonpartisan.**

PTA will NOT be involved in candidate nights, forums or voter awareness programs with organizations that endorse candidates.

How Can My Local PTA be Involved?

1. Form an interview committee.
 - a. Compose and send a questionnaire to each of the candidates.
 - b. Conduct follow-up, in-person interviews. You must inform the candidate about how you will use the information gathered from the questionnaire or interviews. If you simply plan to publish the information to members and/or the public, make that clear.
 - c. Interviews should be held in a non-threatening environment, such as a library, meeting room or other public building.
 - d. Do not conduct your committee meeting in any place that may imply a position other than noncommercial, nonsectarian or nonpartisan (place of worship, elected official's office, etc.)
2. Schedule a candidates' night or public forum alone or in conjunction with other organizations interested in public education, such as The League of Women Voters, American Association of University Women, or other community group.
3. Have a GOTV (Get-Out-the-Vote), PTA VOTES, or MOCK Student/Parent election campaign to encourage voters to go the polls.
 - a. You may choose to write postcards or send e-mails. Provide information on when voting takes place, locations of the polls and hours of voting.
 - b. You might also offer to give those without transportation a ride to the polls. Have the number for the county election offices handy so individuals can call for answers to questions you might not be able to answer.
 - c. PTA can educate and encourage members to vote.
4. Announce all forums, candidate nights, etc. in the local papers, by placing fliers in the community (ask first), and on local radio or TV stations.
 - a. Your local communications chair should have a list of local media; if not, you may call the PTA communications coordinator for that information.
 - b. If your local PTA or school district has a Web site, make sure to publish announcements there too -- and include your Web site address ("URL") in all other publicity.
5. Contact Texas PTA so they may assist you in this endeavor. We can notify many of our other PTAs of the details so they may attend, observe and learn, or team up with you. **Remember, your success is all our children's and families success. We are all here to help and support one another!**

You Can NOT ask:

- *PTA members to only vote for a particular candidate or party*
- *A candidate to sign a pledge on any issue*

Sample Questions to Guide your PTA

The following questions are examples of what your PTA might want to consider when forming your questionnaire or interview document for an oral interview team or for a candidate forum. You will also want to consider questions that are relevant and pertinent to your school district alone. For example: "When the new football field is completed, what do you propose to do with the old location?"

Your written questionnaire might consist of ten to fifteen questions that the candidate will complete and return to you prior to an interview or forum. Five to eight questions could be selected from the written document for the questions to be asked at the forum.

As attendees register for the candidate forum, you may hand them an index card on which they may write the question(s) they wish to ask the candidates. A committee of forum planners will go through the questions to weed out duplicates and inappropriate questions. A number of the most relevant questions can then form the oral interview questions for the forum.

<p style="text-align: center;">Sample Questions for Board of Trustees Candidates (Mailed to candidates about 10 days before interview or forum)</p>

Candidate Questions for _____ Independent School District Board of Trustees
Presented by _____ PTA

Forum Date: (day), (date), (year), 7:00-9:00 p.m.

Location: _____ Auditorium at _____ School

Candidates: All the questions below will be put into a bowl. Altogether, 15 of the questions will ultimately be asked. A candidate will pull a question from the bowl and will have 2 minutes to respond. Another candidate(s) may then make a 1 minute secondary response. Each candidate will ultimately be pulling 3 questions from the bowl and each candidate will be limited to 3 secondary responses.

1. What guidelines do you think should be adopted by ___ISD with regard to bullying?
2. Statistics show child abuse is an increasing problem both nationally and locally. How do you plan to address this while serving on the School Board?
3. Do you believe that it is a legitimate function of public schools to inform students about their rights regarding physical and sexual abuse and the agencies to which they may turn for help?
4. As a school board member, what action, if any, would you take to adequately fund our schools?
5. As a school board member, you are responsible for all children. How will you ensure that teachers are properly evaluated and held accountable so that all students receive the best, most appropriate education?
6. Schools are valuable community resources. There is a growing movement to have schools become neighborhood resource centers, open to the community earlier in the morning and later in the evening for a variety of uses. Are you aware of this concept and would you support it? What activities would you like to see available during these times?
7. How can a board, with differing opinions on major topics, work together to achieve common goals for the district?

8. As a board member, once the school board votes to approve an action or policy, what do you believe is your responsibility to that policy or action? What is your responsibility if you did not support that policy or action?
9. The TAKS test is a requirement. All students have to pass this test in order to graduate from high school. What resources would you commit to ensure our students' success?
10. What is the appropriate relationship between the ___ISD School Board and Site-Based Decision Making Committees?
11. How important are fine arts and extra-curricular activities such as athletics to an overall education? How should they be funded?
12. What is your view of Home Schooled students, Private School students, and Charter School students participating in extra-curricular activities in the public schools?
13. How do you feel about Headstart? How should it be funded?
14. How do you see ___ISD responding to the competition of private schools?
15. How do you feel about the current teacher/student ratio class size limits, and what options does ___ISD have to change these limits if you feel that is necessary?
16. Do you have any specific changes you want to see made in our schools' curriculum?
17. What is your position regarding self-esteem and self-worth educational programs?
18. In the face of declining resources, what projects do you foresee for future bond elections?
19. Why do you want to be a school board member?
20. Have you ever run for or been elected to public office?
21. How would you rank these in importance and why: Planning, discipline, methods, evaluation.
22. In what ways have you been involved in your children's public school(s) prior to becoming a candidate for the school board?
23. In what other ways (church, clubs, service organizations) have you been involved in our community?
24. What do you see as the future role of public education in our society?
25. Please state two or three major goals you want our school district to accomplish during your term of office, and describe the steps you would take to see that those goals are achieved.
26. How would you improve learning conditions in "high needs" schools? What kind of special training or preparation will teachers in these schools need?
27. What suggestions do you have for recruiting and retaining teachers and other professionals in our school district?
28. How do you propose to maintain the public's confidence in the School Board?
29. To be effective, a Board member must gain support from other members for his/her issues. Explain how you plan to get other Board members to support your goals.
30. Board members must, at times, decide to support or to oppose controversial issues that have vocal supporters on both sides. What process would you use, and with whom would you consult in making such decisions?
31. Do you favor privatizing (hiring private companies or individuals to perform work currently performed by school district employees) any school district programs or services, academic, management, or support services? Why or why not?
32. Please list your organizational affiliations, groups and/or individuals that support or endorse your candidacy for the local school board. (You may enclose campaign materials, a resume, or other such material if you wish.)
33. In the development of a school district budget, what goals and objectives would guide your decision-making?
34. What should be the relationship of curricular and extra-curricular activities in the school district program and budget?
35. What are your financial priorities for the school district? (Examples: reduction in class size, improved technology in the classroom, maintaining current programs, increasing school employee compensation)
36. Describe how you would provide quality education for a diverse student population: i.e. the gifted and talented, the average student, special needs students, the physically challenged, the academically challenged, English language learners, and cultural differences?
37. What is your view on charter schools? What role should the local school board play in approving charter schools?
38. What is your philosophy regarding the increased emphasis on testing to a standards-based curriculum?
39. How do you respond to a parent, who wants the district to limit access to or remove books form the school library or classroom?
40. Legislation establishes state policy. To what extent would you like to be involved in legislative activity?

41. What do you believe your relationship should be to local, city, and county officials? How should the board achieve this?
42. What is the most important role of the superintendent?
43. Are you educating or did you educate your child in public school, private school, or other alternative education?
44. What public or private organizations have endorsed you and/or contributed to your campaign?
45. Should teacher quality be tied to student performance?
46. Do you plan to support a tax increase?
47. Do you think our students have enough recess time and do the schools allow for enough physical activity so that kids can let off steam and maintain a healthy level of physical activity?
48. What security measures do you support to keep students and teachers safe from attacks by other students?
49. Are you open to online schooling options?
50. Are you open to participation by homeschoolers in school activities?
51. What new programs do you plan on implementing?
52. What current programs will be cut or expanded?
53. How do you plan to improve communication and participation with parents and other caregivers?
54. How does PTA fit into your plan?

Sample Questions for Candidates to the Texas Legislature

(Mailed to candidates about 10 days prior to the interview or forum)

Candidates: All of the questions below will be put into a bowl. Altogether, 15 of the questions will ultimately be asked. A candidate will pull a question from the bowl and will have 2 minutes to respond. Another candidate(s) may then make a 1 minute secondary response. Each candidate will ultimately be pulling 3 questions from the bowl and each candidate will be limited to 3 secondary responses.

Candidate Questions for the Texas Legislature

Presented by _____ PTA

Forum Date: (day) , (date) , (year), 7:00-9:00 p.m.

Location: _____ Auditorium at _____ School

1. What changes should be made to the current tax structure in order to fully fund public schools?
2. What is your position on vouchers? Please explain.
3. Would you support decreasing the growing number of unfunded mandates and if so, which ones?
4. Do you support the state-mandated school start date?
5. What is your position on charter schools and their accountability?
6. When do you think school boards should hold their trustee elections and should the date be mandated?
7. The transportation allotment has not been increased for years. What would you propose to provide some support to school districts in this regard?
8. How can the state legislature assist the fast growing school districts in the metroplex areas and also the rural school districts that are experiencing declining enrollment?
9. What steps can the state legislature take to ensure school buses are fuel efficient and that they do not emit harmful exhaust?
10. What programs could be considered to encourage more graduates to attend college and major in education in order to increase the number of teachers?

11. What is your view of Home School students, Private School students, and Charter School students participating in UIL activities?
12. What steps can the state legislature take to assist districts with teacher retention?
13. Do you support No Child Left Behind? Why or why not?
14. If you wanted advice on proposed legislation regarding education or school finance, who would you ask and why?
15. How important is parent involvement to student success?
16. What should parental involvement “look like”?
17. What can be done in our public schools to battle childhood obesity?
18. How stable do you think the Teacher Retirement System is?
19. What percentage of public school funding should be provided by the state? Please explain.
20. What one thing could the state legislature do to ensure the success of every student?
21. How much parental input should be allowed in decisions pertaining to students’ curriculum, school environment, transportation, safety, and accountability? Please explain.
22. Describe what an “inclusive” school means to you.
23. What are you going to do to ensure inclusivity in our schools?

Ballot Issues

If your PTA wishes to hold a forum on a ballot issue, such as an override or a proposition that affects education, you can modify this suggested format.

To host a forum for a ballot issue, you need to have a panel of approximately five people who are knowledgeable on the subject, preferably some for and some against it, who can answer questions on the ballot issue. Your PTA may want to consider having one person from your school board, one administrator, one community member, and two others to be identified by your PTA. You might want to consider inviting one of your local state legislators to be on the panel.

For a ballot issue forum, your PTA might want to skip the gathering of questions ahead of time and go strictly with questions from the audience. If your PTA does use that approach, it is recommended that you have a couple of people to screen the questions as they are passed forward so that the same question is not asked again and again. Screeners can also screen out inflammatory questions. Each panelist might be given five minutes or less to introduce themselves and speak on the ballot issue so the audience knows who they are ahead of time.

Bond Elections

Excerpted from “Window on State Government”, prepared by Susan Combs, Texas Comptroller of Public Accounts

What are School Bonds?

The largest single sum of money that most districts will receive at one time will be the proceeds from a municipal bond issuance. Bonds are authorized by the voters and sold by the district for large projects to spread the cost over time to succeeding users of the facilities. Based upon a district's needs and the state's limitations on the amount of indebtedness a school district can carry (not to exceed 10 percent of assessed property valuation), the entire authorized amount does not have to be issued immediately. A district may issue bonds in phases.

Most issues are tax exempt and in Texas are backed by the Permanent School Fund. Tens of millions of dollars are made available to pay for major construction projects when voters authorize bonds. When bonds are sold, the district is agreeing to pay interest to the buyers on a set schedule and soon after bonds are issued, the debt-service payments begin. Funds must be set aside to make payments on the debt.

Questions to Ask

Accounting For and Managing Debt

1. How does the district analyze, evaluate, monitor and report debt financing alternatives?
2. What procedures are in place for refunding bonds? When was the last time the district refunded bonds? What were the interest savings from the refunding? How did the district improve its cash flow position as a result of the refunding?
3. Who monitors the arbitrage provisions, and does the district comply with arbitrage provisions?
4. Does the district classify bonds payable properly between current and non-current? Does the district record the bonds in accordance with GAAP and are sufficient notes included in the financial statements?
5. What procedures are in place to evaluate various alternative financing methods? When evaluating alternative financing methods, how does the district match the expected life of the investment to the financing terms? For example, districts may use bonded indebtedness to purchase school buses with a useful life of approximately 10 to 15 years. How is the payoff of the debt timed to coincide with the bus's useful life? Has there been an instance when the district has applied for or obtained a Qualified Zone Academy Bond (QZAB)? If the district was not successful in obtaining a QZAB, why was the district denied?
6. How does the district select its independent financial advisor, who will choose the method of sale, review and evaluate the costs of issuance of debt, analyze the cost and benefits of advance refunding transactions, provide for compliance with federal arbitrage rebate and restrictions and provide timely reporting the continuing financial disclosures?
7. Has the district applied for and made optimum use of the instructional facilities allotment programs authorized under Chapter 42, Texas Education Code?
8. Does district policy require disbursement of bond proceeds to follow bond indenture guidelines?
9. Has the district ever engaged in bond refunding? Is there any evidence that bond proceeds were used for operating capital, like payroll? Did the refunding result in an improved cash flow and/or reduced overall debt obligations? Were any bond proceeds classified as arbitrage bonds?
10. Did the school district request an arbitrage compliance analysis from bond counsel or the school district's financial advisors?
11. Did significant changes, occur to the drawdown schedule as a result of delays in the rate of completion of pending or current construction projects?
12. How were significant changes to the drawdown schedule, if any, considered for potential amendment of the school board's investment policies?
13. Did any delays in the drawdown schedule result in changes to cash flow projections for the bond issuances that were presented in the monthly financial reports to the school board?
14. Did the TEA refuse to approve any bond issuances for Permanent School Fund guarantee? Why?
15. Were any bond proceeds invested at a higher yield than the effective interest rate paid on the bonds? When and for how long? How did the district ensure that it complied with arbitrage laws?
16. Were any bond proceeds invested at a yield that was more than 10 percent below the effective interest rate paid on the bonds? Why?

17. Did the school district's investing practices comply with the school district's investment policies and specific securities authorized by bond covenants?
18. Was uncertainty in the drawdown schedule considered in plans to leave 10 to 20 percent in a pool or money market fund so that an unexpected draw would not force a security sale at a loss?
19. If the district was subject to an IRS rebate, did the district attempt to attain a positive spread or a higher rate of return on securities purchased than the rate paid to borrow the funds?
20. Were debt-related costs effectively controlled by one or more debt management techniques, list below:
21. Implement a board policy to establish a debt ceiling that is related to the district's ratio of long-term debt to the amount of taxable property and/or the debt rate cap;
22. Build projections of the district's budgetary and cash flow requirements for a three to five-year period to understand the district's total debt requirements. These projections will facilitate study of all debt options and also help avoid excessive borrowing fees as a result of repetitive debt borrowing that could have been consolidated under a single loan;
23. Build and maintain a rainy day fund to avoid short-term borrowing;
24. Compare debt financing options and costs under all options available in the marketplace, especially when considering lease-purchase financing, which is generally viewed as an expensive option in most instances;
25. Actively monitor the economic advantages of advance refunding of long-term debt; and
26. Use formal competitive procurement methods to obtain the best competitive bids or competitive proposals for financing costs?
27. What portion of long-term bonded indebtedness was issued to finance repairs and maintenance or other items that were not capitalized?
28. What has happened to retainages or any other bond proceeds that were not fully spent on the approved projects? Were these funds handled in a manner consistent with the FASRG that states that upon completion of a project, any unused bond proceeds are transferred to the Debt Service Fund and are used to retire related bond principal?
29. **Bond elections**
 - How effective were recent bond elections?
30. What were the voters' biggest objections to the bond?
31. How did the district address these concerns?
32. What were the voters' biggest areas of agreement?
33. What mechanisms were used to publicize the bond and provide voters information about the bond and the potential use of the money?
34. How did the district ensure district funds were not used to promote the bond?
35. How were citizens involved in the decision to ask for a bond?
36. How were parents engaged in the process?
37. What criticisms did the community levy after any failed bond elections? How did the district modify its approach in future bond elections to address these criticisms?
38. What covenants or promises were made to citizens at the time of the election? If the bond was successful, how is the district providing assurances that these promises are now being kept?
39. **Bond issuances**
 - Does the district have a board-approved policy on issuing bonds?
40. Does the district have procedures in place for issuing bonds?
41. How did the district present its most recent bond proposal? How was it received?
42. What technical assistance did the district have during the bond issuance process?
43. Who is the district's financial advisor?
44. How does the district comply with restrictions/requirements in the bond indenture?

45. What provisions were made to ensure that the timing maturity of investment would coincide with dates of debt service payment?
46. Does the district have board-approved policies for issuing and managing debt that recognize any federal, state or local limitations imposed on the type and amount of debt issued?
47. How does the district's policy limit the ratio of debt to taxable property with an appropriate factor for assistance from the instructional facilities allotment?
48. How does the district calculate and monitor compliance with federal arbitrage regulations?
49. Has the district employed or contracted for the services of financial advisors, bond counsel and the external auditor either in day-to-day investment activities or when evaluating and issuing debt obligations?

For more information concerning Lobbying Rules, School Bonds:

Nonprofit Voter Engagement Network: www.nonprofitvote.org

Center for Lobbying in the Public Interest: www.clpi.org

Alliance for Justice: advocacy@afj.org

Texas State Comptroller: <http://www.window.state.tx.us/tspr/protocol/final03/ch06h.htm>

Boundary Changes and Elections

PTAs can facilitate a forum to learn about the boundary proposals or if unable to conduct a forum, formulate a questionnaire that can be completed by school district personnel and sent to your local newspaper with the school district's responses.

Remember to keep it nonpartisan, non-secular and open-minded as this is a way to help the membership become knowledgeable to make informed decisions during election time. Be sure to get your PTA Council's approval of the questions to be presented.

Sample Questions to Ask For Boundary Change Elections

1. Who are your boundary committee members? Do they accurately represent the makeup of your community or school district? If not, why?
2. How were the proposed boundaries determined? What was the process?
3. Are there any dangerous roads or crossings now included in the boundary changes? This includes seasonal dangers (flooding busy intersections).
4. What is the transition plan for incoming Seniors? If Seniors will be required to move to a new school, what is the plan to ease the transition?
5. What is the current enrollment on each campus and how will it change with this boundary plan?

6. How is the ethnic and economic balance on each campus impacted by the proposed plan?
7. Will there be any changes to course offerings as a result of new boundaries?

The questions above can be used as a starting point for your PTA and you can tailor this to your individual district's needs and situation. Texas PTA encourages you to notify the state office when you host or participate in any forum so that we may assist in any way possible, and to help encourage others in your area to participate.