



AAGT Affiliate Chapter Handbook

Reviewed 2017

Arizona Association for the Gifted and Talented

AAGT Affiliate Chapter Handbook

The original AAGT Affiliate Chapter Handbook was prepared by Shelley Ackerman Hirsch of the 2006-2008 Board of Directors of the Arizona Association for Gifted & Talented (AAGT).

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The Handbook was reviewed with no revisions in 2017 by Thomas Nolasco.

Special thanks to the Ohio Association for Gifted Children and the Florida Gifted Network for permission to use some of their information and materials in the original document.

If you are interested in learning more about the AAGT affiliate chapter handbook, processes, materials, and procedures, or in becoming an affiliate chapter of AAGT, please contact:

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Chapter 1 Why Organize a Local Gifted Advocacy Group?

There is strength in numbers! The more people you can educate about the characteristics and needs of gifted children, the greater impact you will have improving gifted education in your community.

AAGT encourages parents, teachers, coordinators, and anyone concerned about the needs of gifted children to organize and become an AAGT Affiliate Chapter. The stronger our network, the better our ability to improve the quality of programs and services for gifted and talented children throughout the state. AAGT is part of the larger chain of state gifted associations that affiliate with NAGC, the National Association for Gifted Children. By creating an affiliate chapter of AAGT, you also become part of the national network of advocates for gifted and talented children.

AAGT is proud to assist local groups in forming, operating effectively, and contributing to this important network. For details on organizing a parent support group, please refer to “Specifics for Starting a Parent Support Group” in Chapter 2.

How to Become an Affiliate Chapter of AAGT?

1. Complete an AAGT Affiliate Chapter Membership Agreement (see Appendix J for sample), which requires three officers names and contact information, a financial statement, and a list of activities.
2. Create Bylaws, including appropriate dissolution clause (see Appendix B for sample bylaws);
3. Submit affiliate chapter membership fee (\$50 initial fee; \$50 annual fee) payable to AAGT;
4. Send the following items to officemanager@arizonagifted.org: the completed Membership Agreement; attached Bylaws; financial statement; a list of activities; and the AAGT membership fee. You will be notified upon approval.

Who may form an affiliate chapter?

- Parents
- Teachers
- Retired teachers and administrators
- Gifted Coordinators
- Students
- Community/Business Partnerships
- Professional Service Groups (consultants, psychologists, counselors)
- Anyone interested in helping advance opportunities for the gifted and talented in AZ

How do groups benefit from AAGT affiliation?

1. Receipt of the Affiliate Chapter Handbook, with useful tips on groups and advocacy.
2. Help creating federal 501 (c)(3) tax-exempt status pursuant to AAGT’s group exemption letter from the IRS.
3. Use of AAGT website to create a link to your own group’s webpage.
4. Access to the periodic “E-News” for all affiliate members who are also members of AAGT.
5. Two free registrations for AAGT conference. Contact the AAGT office manager for details.
6. 20% discount for two affiliate group members to attend the Parent Institute.
7. AAGT will provide 60-90 minute parent seminar once per school year OR 60-90 minute presentation to teachers on a gifted topic.

8. Discounts from AAGT vendors and publishers when available .
9. Reserved place at the Affiliate Roundtable Discussion during the annual conference
10. Participation in the state-wide network of the gifted community, which includes parents, educators and other professionals, businesses, and government.
11. Consultation with experts from the AAGT Board of Directors regarding operation of your group.
12. A place at the table - your voice will impact local and state AAGT policy. Affiliate chapters may be represented at regularly scheduled board meeting.
13. Advocacy alerts from AAGT & NAGC.
14. Rights to reprint articles from AAGT E-News, as well as most articles from the AAGT website in affiliate newsletters and publications without specific permission, but with proper citation.

How do gifted and talented children benefit from your affiliation with AAGT?

- A larger network is created to accomplish gifted advocacy at local and state levels.
- Local resources are organized to strengthen and expand services and events for gifted children.
- Communities become more informed about giftedness and more involved in gifted education.
- Volunteers and leaders are attracted and developed to help gifted children and carry out the AAGT mission.
- Local advocates are available to carry out important work in all parts of the state.
- Your organization becomes a ready-made focus group or advisory committee to assist local educational institutions and confer with them about gifted issues.

What are the Rights and Responsibilities of AAGT Affiliate Chapters?

Each year every AAGT Affiliate Chapter completes a new AAGT Affiliate Chapter Membership Agreement, attaching all required items and enclosing renewal dues. (See the Appendix J for a sample.) AAGT affiliate chapters agree to abide by the AAGT Bylaws and agree to meet all other requirements. AAGT does not monitor or suggest group activities or relationships in any way other than as described in this document and on the AAGT website. While affiliate groups are independent of AAGT, the AAGT Board of Directors is always available for help or advice. AAGT may occasionally ask affiliates to help by surveying their members or passing on important information. The membership term runs one (1) year from the date of approval.

One of AAGT's functions is to educate legislators about the needs for gifted education. When an important state or national issue comes up, AAGT might have a call to action. Your response will have a direct effect on the outcome. Always check the advocacy page at the AAGT website for the most current information. Look for advocacy alerts and links. Contact AAGT for more information about how you can help and get involved.

Following are a few items about record-keeping:

- AAGT requires that each affiliate chapter annually submit to officemanager@azgifted.com the following documents in order to maintain affiliate status: Affiliate Bylaws, Affiliate Chapter Membership Agreement, Financial Statement, a List of Activities and an UPDATED LIST OF MEMBERS (see Appendix G)
- The AAGT Office Manager will send out letters requesting these updates annually. Sample bylaws, purposes and goals/objectives, treasury reports, contribution receipts, membership reports, and financial statements are contained in the Appendix to this Handbook. Although AAGT does

not offer any training specific to record keeping, you may request advice from the AAGT Affiliate Membership Committee Chair or the AAGT office manager. These issues will also be reviewed during the Affiliates Roundtable Discussion at both the annual AAGT Conference and Parent Institute Day.

- Each affiliate chapter should have a treasurer who documents all cash and material donations. All donations and expenses need to be recorded and summarized on a treasury report.
- Receipts for cash donations are not required, but many donors will desire and request a receipt for their IRS reporting purposes. A simple receipt book purchased from a local office supply store will suffice for these purposes.
- To open a bank account, your organization will need to show the bank your EIN letter from the IRS and “organizing documents” such as articles of incorporation.

Other Affiliate Chapter FAQs:

Q - How do we find out if our group’s affiliate status is current?

A - Please e-mail the AAGT office manager at officemanager@azgifted.com for this information.

Q - Do we need to file any forms with the Federal Government?

A – If your affiliate group collects dues, there are a number of forms you will be responsible for. First, you need to obtain your own tax ID number from the IRS, even though your chapter receives federal 501(c)(3) tax-exempt status by virtue of being an affiliate chapter in good standing with AAGT. To do this, visit www.irs.gov and complete Form SS-4. Your tax-exempt status entitles your organization to receive tax deductible donations and make tax-exempt purchases. See IRS Publication 557 and the Appendix of this Handbook for more information. Second, your organization will be required to complete an IRS Form 990-N annually. This is a very short, simple, on-line form, called an “e-Postcard.” All tax-exempt organizations that normally have gross receipts under \$25,000 and do not have to file Form 990 or Form 990-EZ must file the e-Postcard by the 15th day of the fifth month after the close of your tax year (which will be the same as AAGT’s---September 30th). If you do not file, you risk losing your tax-exempt status. See www.irs.gov/eo for more information.

Q – Do we need to file any forms with the State Government?

A – No, but it is suggested that your organization consider becoming a non-profit corporation with the State of Arizona. This is important to provide your officers protection from personal liability for the organization, and to facilitate opening a bank account. See the Arizona Corporation Commission’s website at <http://www.azcc.gov/divisions/corporations/filings/forms/cf0041.pdf> for instructions and forms.

Q - How does our affiliate group document donations?

A - Each affiliate group should have a treasurer that documents all cash and material donations on a treasury report. This report should also be used to record expenses. See the Appendix for a sample Treasury Report. There is also a sample receipt you can give to donors.

Q - May affiliate groups solicit contributions/donations via direct mail or face-to-face interaction?

A - Yes, contributions and donations of cash and materials may be solicited via direct mail, door-to-door inquiry, etc. However, AAGT does not recommend door-to-door solicitation, especially if children are involved.

Q - May affiliate groups solicit advertising for and to be included in affiliate newsletters?

A - Yes, affiliate groups may solicit and charge for advertising in affiliate newsletters taking care that the mission of the advertiser is not in conflict with the mission of the affiliate and AAGT.

Q - May affiliates reprint articles from AAGT publications and website in affiliate newsletters and publications?

A – Most articles from the AAGT website may be reprinted in affiliate newsletters and publications, without specific permission, if credit is given. However, to avoid violating copyright laws, please check with each author of specific articles for permission and credit requirements.

Q – What do we need to know before opening a bank account?

A - In order to open a bank account for your organization, you will need to provide the bank with:

- Name and contact information for three officers,
- EIN (tax ID Number)
- Copy of AAGT’s group exemption letter from the IRS and the AAGT letter granting your organization affiliate status.
- “Organizing documents” – Bylaws are usually not sufficient; you might need to register a trade name with the state of Arizona (file an “Application for Registration of Trade Name” with the Arizona Secretary of State printed from their web site http://www.azsos.gov/business_services/Forms/Tradename/apptn.pdf for a \$10 filing fee and receive stamped verification from the Secretary of State that you can present to the bank). Or if your organization has filed with the AZ Corporation Commission as a non-profit corporation, you can use those documents. See <http://www.azcc.gov/divisions/corporations/filings/forms/index.htm> for the two required forms: Articles of Incorporation for Tax-Exempt Non-Profit Corporations (includes instructions) and Certificate of Disclosure for Non-profit Corporations.

Q – How do we find out more about the AAGT mission and bylaws?

A – Visit the AAGT website at <http://arizonagifted.org> to read about AAGT, our vision, mission, goals, bylaws, board members, and events.

Chapter 2 **Specifics for Starting a Parent Support Group**

Why Should Parents Organize?

Why start a support group for gifted education? What are your goals? Here are some that parent groups have had (and see the Appendix for more ideas):

- To expand your knowledge about gifted/talented children and their needs.
- To gain mutual support and help.
- To advocate and/or effect change.
- To educate legislators and community to the need for appropriate education for gifted students.
- To advocate with school administrators and teachers to get appropriate education implemented in the schools.
- To become a link in the larger chain of state and national organizations.
- To provide social and enrichment opportunities for children. (Example: Field trips, Saturday enrichment programs, participation in newsletters, family group or play group concept with monthly adventures or activities.)
- To support or provide resources for the district gifted program.

Parent groups are often a direct outgrowth of a program for gifted and talented students in their school system. These groups may choose to partner with their individual district or school to plan and co-host their activities, in effect serving as their district's "gifted PTO." Other affiliate chapters may maintain their group's autonomy, choosing to serve a geographical area covering the local public school district, charter schools, and home schooled students. In any case, AAGT encourages parent groups to establish a good working relationship with your local school administrators, although it is not required to officially partner with them or get their permission to exist.

What is the Best Way to Organize a Parent Support Group?

Investigate: The first step in the process is to investigate: read books, periodicals and websites about gifted children and education. Know your facts!

- Begin to familiarize yourself with information so that some day you will be able to refer to recent, relevant, and expert research results, as well as examples of what other districts are doing.
- Talk with other interested parents in your district. Listen to each other and determine priorities.
- Consider involving all parents who support able learners (i.e., parents who want higher academic standards for their kids).
- Contact your school administration and/or your Gifted/Talented (GT) Coordinator if you have one. Test the waters to determine receptivity. Listen.
- Contact other parent groups in your area. There is usually a willingness to share experience.
- Contact AAGT to see what other guidance and assistance is available.
- Be a diplomat; find out how you and your organization can help the administrator and the school district.

Organize: After you have done some investigation, take these steps to make your idea become reality.

- Gather a group of like-minded people and determine your purpose and goals; put them in writing. (See the Appendix for sample ideas.)
- Name your organization. It's good to have a short name that can be easily referred to, or an acronym that can be pronounced. Develop a logo.
- Arrange for a first meeting. (Try getting a free calendar listing in a local newspaper or parenting magazine to advertise this first meeting.)

Strengthen your Organization:

- Write and formally adopt a constitution and by-laws. (See the Appendix for sample bylaws.)
- Select an Executive Board or Steering Committee and parent representatives/liaisons for each school within your district or area.
- Determine membership dues (if any) and prepare a membership form and process.
- Establish regular meetings – decide on frequency, type and location.
- Prepare a budget: dues, expenses, fund-raisers, etc.
- Select officers – president, treasurer, secretary, program chair, newsletter editor and others your group needs.

Plan Useful and Effective Meetings:

- Have people at the door to greet arrivals. Have index cards or a sign-in sheet for all attendees to fill out with name, email, address, phone number and school. Keep an updated database of this information.
- Distribute membership forms and questionnaires. Be prepared to collect membership dues, if applicable. (To increase membership, consider having new members participate in a lottery for a door prize.)
- Start promptly.
- Prepare an agenda, post it or hand it out, and follow it!
- Allow time for input from those attending.
- Introduce officers and school representatives or liaisons. Ask for volunteers where needed, including standing committees.
- Announce next meeting. Determine a “good” time for most people. Set aside the same time and day of the same week of each month.
- Invite a speaker. Someone who is knowledgeable about your district's services is a good beginning. Allocate the major portion of the meeting to the speaker and the questions that follow.
- Don't let your meetings become a “gripe” session—keep discussion focused, positive, and productive.

Consider These Points to Improve Chances of Success:

- Public Relations – how you are perceived.
- Interaction with other organizations.
- Widest possible appeal – no restrictions on membership and useful, informative events.
- Connection with school district – coordinator and/or advisory council. Ask if the gifted program will give your information to students and parents.
- Fundraising and donations.
- Affiliation with AAGT (see above for benefits of affiliation).

Look to the Future:

- Keep in contact with your coordinator, principals, superintendent, and teachers with regard to gifted programs and services.
- Establish a webpage and send out e-newsletters to keep members informed.
- Periodically evaluate your goals and your progress in meeting them.
- Share articles of interest with local newspapers and your parent liaisons for each school. (AAGT affiliate chapters often share information received from AAGT.)
- Unite the voices of parents so that ways can be found to address the educational needs of able students. For most School Boards, twenty names signing a letter or three people showing up to a Board meeting is a groundswell of support.
- When advocating for services, you will need to compromise between assertiveness and diplomacy. Keep in mind that changing curriculum takes years. If the administrator is sympathetic, find out where the barriers are and try to push there. Always choose diplomacy first. Remember: “Nice counts” and you are modeling behavior for your children. Always be respectful and treat each and every district personnel as you expect to be treated.

Avoid These Pitfalls:

- Expecting overnight success. Never underestimate the lack of knowledge and interest among some administrators.
- Trying to do it all at once. Plan your growth in steps.
- Not using volunteers. Share the work. Keep eliciting support so that your group will grow, not have the same few people doing all of the work
- Not clarifying volunteer jobs. People get discouraged when they volunteer for a job that does not need doing.
- Allowing personality conflicts to interfere. Everyone has a unique view so emphasize common goals, even if paths differ. Respect each other’s opinions and be willing to compromise. Discuss differences openly and in friendship.
- Letting one person take over a meeting with concerns about his own child. Express sympathy for the situation and suggest continuing the discussion after the meeting, or state at the beginning of the meeting that questions about individual children should be asked after the meeting.
- Letting one person take over the meeting with negative comments and ideas. Keep discussion positive!

Cultivate:

- Diplomacy, not just with school personnel, but in all relationships. Parents of children who are not gifted have a difficult time understanding parents of students who hear a different drummer. Develop empathy for everyone’s situations.
- Political awareness. Keep abreast of local, state, and federal legislation and keep members informed. (AAGT affiliate chapters receive advocacy alerts.)
- Staying on track. Ensure that all decisions and actions of the organization are in keeping with your original goals. Many worthy ideas will arise but implementation will take time and energy away from meeting those original goals. Keep a list of new ideas for possible inclusion in future goals.

- Encouragement. If your group helps one family to understand their child better, it is a success. If your group makes one principal aware of the needs of gifted children, it is a success. Keep track of your successes and congratulate yourself on them.
- Communication. Look for ways to inform as many parents as possible about your group. For example, ask if your school district will provide information about your group to parents who bring their child to the district for testing. Archive your past e-newsletters. Invite local business leaders to be on your board.

Remember to promote the needs of the gifted, but never at the expense of other children. We expect educational opportunities for our children appropriate to their ability to learn. This is a realistic expectation - do not be deterred from it!

Be Aware, Be Patient, Be Persistent

Chapter 3 Parenting a Gifted Child

Parenting Resources

Parenting a gifted child is an adventure. Your first stop should be to join the Arizona Association for Gifted & Talented (AAGT) and take advantage of the myriad of resources available to you. We encourage you to visit our website <http://arizonagifted.org> to learn about such information as the definition of giftedness according to Arizona guidelines, the terms used by educators, the characteristics of gifted children, common myths about gifted children, tips for helping your child succeed, educational program options that you can ask for in your district, resources for outside learning opportunities, suggestions for how to advocate for your child's needs, and information about websites, books, articles, catalogs and membership in AAGT.

So to begin your online search for resources, start with <http://arizonagifted.org>. There you will find a list of valuable internet resources, including www.hoagiesgifted.org and www.sengifted.org.

If you are looking for a parent group, go to the Affiliate Chapter link at <http://arizonagifted.org> to locate any groups that may be organized in your area. If there is no parent group in your area, consider contacting a representative from the closest parent group that is established, or contact the AAGT Regional Parent Coordinator from your area. These groups can offer support, information, and discussions with other parents of gifted children and are a wonderful way to pool resources for the benefit of gifted children.

Advocacy 101

When faced with the need to speak on behalf of your gifted student, you will quickly learn that what is happening with your child is linked to the larger context of education – what is happening in the classroom, the school, the district, etc. When your child needs challenge, help, or support at school, the kind of response you will get is affected as much by the quality of leadership as by the quality of teaching and parent support, not to mention available resources. Most parents of gifted students eventually discover their own child is one of many who need help.

- Become an educated and informed parent. Understand characteristics of giftedness and think about your child's specific learning needs. Refer to the AAGT website <http://arizonagifted.org> for links to help you do this.
- Become familiar with your child's school setting and the people in charge. Learn how your school and the school district are organized. Familiarize yourself with what is supposed to be happening in the classroom, in the school and in the district. Check the Arizona Department of Education's Gifted Education webpage (<http://www.ade.az.gov/asd/gifted/>) for information about gifted programs and services Arizona.
- Establish yourself as an ally to education, through your words and deeds. You can begin by making an effort to meet the teachers, counselors, librarians, nurses, secretaries, custodians, and principals at your child's school.

- Demonstrate your support for the school and win allies in the building by volunteering in some capacity that will help many children. Project a positive image and respect the efforts of all those involved in education—you'll win more allies
- Ask questions rather than complain.
- Learn a little about the terms used in education in order to communicate with teachers; educate yourself by looking at <http://www.hoagiesgifted.org/parents.htm>.

Advocacy in Your Child's Classroom

The first step to ensuring that your child's needs are addressed in the classroom is to talk with your child's teacher. Make an appointment with the teacher to discuss the matter. Be specific about what you want to talk about. If you don't hear back after documented three tries, contact the principal for a meeting.

Remember, you all want what is best for the child. Be persistent. Be diplomatic. And always, always be respectful and polite. You are modeling good behavior for your children. Treat others as you would like to be treated.

There are many online resources for how to help your child at school. The article "Advocating for Appropriate Education for your Child," by Colleen Elam of the Texas Association for the Gifted and Talented covers the following: Learn the Status Quo, Establish Yourself as an Ally to Education, Know What Should be Happening, Give Credit for Jobs Well Done, Choose your Battles, Prepare your Case, and Present your Case. Here is an excerpt from "Present your Case:"

For a classroom problem, contact the teacher first. For a school problem, speak with the principal. Follow the established chain of command in your district. Traditionally it is: teacher>principal>instructional specialist or gifted coordinator>superintendent>School Board. If you are unsure of the protocol in your district ask a secretary in the principal's office.

Many districts may have gifted specialists that work directly with teachers: meeting jointly with the gifted specialist and the classroom teacher can be a good way to start. Developing a friendly relationship with the school secretary is always a good idea. The following excerpt from "Present your Case" suggests meeting strategies.

Call for an appointment first, but be prepared in case the person is able to speak with you at that time. Leave a message with your name, your child's name, your telephone number at work and home (or cell phone), and the reason for requesting a return call or appointment.... Allow 24 hours for your call to be returned, and then call again. If your call is not returned after three tries, move up the chain of command.

Greet the person warmly. Your tone of voice can set the tone of the entire conversation and the consequent actions and reactions. Thank the person for returning your call or meeting with you. Then come immediately to the point. State your facts calmly and in order. Ask your questions or make your request. Then listen without interruption. Take notes on the response. Briefly repeat back your interpretation of what was said; if you need clarification of a point, this is the time to ask. If it is necessary for you to respond with an answer, agree on a time when you will communicate again.

Build bridges; do not burn them. No two people have the exact same beliefs on all issues. Supply data to support your position and back it up with personal stories. Include yourself in the suggested win-win solution.

If you are happy with the result of the meeting, say so and say thank you. However, if you are not happy, take your case to the next higher level on the chain of command and then the next. Keep trying and don't be discouraged.

Consider compromises.

Through this entire process you are teaching your children. First and foremost, you are demonstrating in actions that you love them and consider their education a priority. Second, you are modeling some of the most important lessons in life: every human counts, so respect others as well as yourself; problem-solving involves creativity, logic, protocol, challenge, time, and commitment; think before you respond; take control of any situation as it occurs in your life; act, don't react; be positive and persistent and fight for what you believe in.

Advocating for appropriate education for your child is a continuous process. Your positive, persistent, involvement will foster your child's success in school and life.

(Excerpted from "Advocating for Appropriate Education for your Child," by Colleen Elam of the Texas Association for the Gifted and Talented.) <http://eric.ed.gov>.

Advocacy at the Local Level

Advocacy for your own child often leads you to consider what is needed in your district. If you have the time and commitment, join your local parent group, PTO, or other group that can foster change. Attend School Board meetings and become knowledgeable about such things as the district Acceleration Policy. Check for district websites about gifted and talented services. Meet your Gifted Coordinator and find out what he or she needs to improve services to gifted students.

Get to know the decision-makers on a personal basis and communicate with them frequently. This will allow you to build a relationship of trust and make you the "go to" person on a particular issue. It also allows you to get a feel for the person and the district's hot-button issues.

Get to know your local School Board. They need to know your group exists and that you are current on your information. If your district has a policy committee, a task force on something, a forum, or any other policy-making body, make sure someone represents the gifted view. Decisions are often made only from the perspective of the people sitting at the table. So make sure you get a seat at the table! Never let a slur to your issue go unanswered.

Parent groups can be very effective, even in small numbers. By developing a reputation for a reasoned approach as well as a fierce commitment to appropriate education for gifted children, many gifted parent groups have facilitated change in district, regional, and state policy. A tremendous satisfaction comes from knowing you have made a difference in the lives of many children.

Advocacy at the Regional Level

As you become more knowledgeable about district services, you realize that they are affected by regional issues, especially in rural areas. AAGT provides support to regions throughout Arizona. Contact your area Regional Parent Coordinator to find out what is happening in your part of the state. You will be able to meet with parents who share your concerns, and you can share knowledge and gain from one another's experience. Here are some other ideas to be more informed:

- Attend any AAGT meeting or event in a regional area, such as a nearby Affiliate Chapter meeting.
- Visit the AAGT website to find nearby parent groups.
- Join the AAGT Facebook discussion groups, where you can ask questions of other parents and teachers.
- Develop business partnerships to benefit your district and regional area.
- Build relationships between districts gifted coordinators and parents by inviting coordinators to Affiliate Chapter meetings.
- Maximize regional resources to build capacity for parent groups. Connect with other groups to share strategies, bring in speakers, and co-host larger functions.
- Join with PTO's for meetings and to bring in speakers.
- Network with non-public schools - parochial, charter, independent, home school networks.
- Communicate among parent, coordinator and teacher groups to share information.

Advocacy at the State Level

As you become more aware of issues at the regional level, you realize that the big picture solutions come at the state level. AAGT is involved in educating legislators, sharing information and resources with the Arizona Department of Education, and sponsoring annual conferences where vendors, presenters, and gifted educators of all sorts, including parents, can learn and grow.

The first, most important step to becoming aware of state issues is to join AAGT. AAGT is a statewide organization. It is also an affiliate of NAGC, the National Association for Gifted Children. Organize and encourage your group to become an affiliate chapter of AAGT, as there is strength in numbers. Whenever an important legislative matter comes up that will affect gifted education, keep in mind the following tips so that you can have an impact and make a difference:

- Know whom your representatives and senators are at both the state and federal levels. Know where they stand on various issues. Visit www.azleg.gov to identify your elected officials and learn about them.
- Designate someone in your organization to keep abreast of legislative issues relating to education in general and gifted education in particular.
- Inform your members when an email, letter, or phone campaign is necessary. Form a telephone committee to facilitate this action. At least once a year include in your e-newsletter a sample letter to a legislator or include this information on your webpage.

If you are interested in advocating at the state level, or finding out more about AAGT's legislative activities, contact AAGT.

Chapter 4 What is the Law?

Arizona is fortunate to have a legal mandate for gifted education. The law, ARS 15-779 et seq, provides specifics for mandatory gifted education for kindergarten through 12th grades. Districts are required to involve parents and the community in the development and evaluation of gifted programs and services.

Spearheaded by parents, the gifted education community succeeded in having new legislation drafted, sponsored by the chair of the House K-12 Education Committee, and passed (HB 2552) in 2006 that strengthened the existing mandate and doubled funding. **Although the mandate is still in place, it is no longer supported by state funds.** Key points in the legislation include:

- (1) changing the definitions of gifted and gifted education to recognize that students are gifted 24/7 and service must be appropriate, an integral part of the regular school day, an integrated and differentiated experience, and commensurate with ability;
- (2) requiring that administrators, teachers, counselors, and school psychologists have professional development to understand giftedness and gifted education modifications;
- (3) declaring it to be in the public interest to assist high achieving and under achieving pupils identified as gifted (i.e. a top down declaration of its importance to our state);
- (4) requiring governing boards to modify the course of study and adapt teaching methods, materials, and techniques for gifted students, including those who may have a disability or difficulty with the English language;
- (5) making it easier for gifted transfer students to receive services without unreasonable delay in their new school;
- (6) requiring that the state board of education develop written guidelines to assist governing boards in identifying gifted pupils and providing appropriate programs and services from kindergarten through 12th grade;
- (7) requiring that Scope & Sequences be developed that include specific criteria based on the National Gifted Standards and be updated annually if changes have been made or every 5 years if no changes have been made;
- (8) requiring districts to conduct annual evaluations, and include parents in the development and evaluation of, programs and services; and
- (9) requiring active involvement of the State Superintendent in the development and implementation of gifted professional development, programs, and services.

In addition, the supporting Administrative Code provides additional guidelines for the ADE, school district governing boards, teachers, and parents in meeting the mandate.

To read the statute and administrative code, visit <http://www.ade.az.gov/asd/gifted/Statutes.pdf>. This law is important for all parents and educators of gifted children to know about and understand. Please take the time to read the law and understand how it impacts your child(ren), your school, and your school district. If you have any questions, please feel free to contact AAGT. We will refer you to a knowledgeable board member who will try to answer your questions or even arrange to have a speaker come to your area to discuss the law.

Chapter 5 Appendices

Appendix A. Sample Purpose, Goals/Objectives, and Duties for Parent Groups

When forming your purposes and goals ensure that you are not duplicating efforts in your community.

To determine your group's purpose, decide what you want to accomplish by forming this group. Here are a few examples:

- To solicit support for gifted and talented children from local and state policy makers (School Board members, administrators, legislators) and interested community organizations, businesses and industries.
- To share information in the educating and parenting of gifted children.
- To seek new experiences for the advancement of gifted and talented children by providing exposure to cultural and other educational opportunities.

To determine your group's goals and objectives, be sure they fulfill your purpose. Plan long-term goals for long-range planning and plan short-term, more immediate objectives, for implementation during the current school year. Ideally, objectives will be small steps to achieving the longer-term goals. The following are a few examples:

- To work with local school administrators to implement, expand or refine a program of instruction for gifted students in your school district.
- To publish a monthly newsletter to be sent to all members of the organization, school, school personnel, local legislators and interested community organizations and businesses.
- To provide for the education of elected officers in the needs of the gifted.
- To establish a library containing material to educate parents and teachers in understanding gifted children.
- To establish a legislative committee to promote legislative education and support on behalf of gifted children.
- To establish a mentorship program.
- To provide sharing opportunities for parents to learn how to deal with the challenges of raising gifted children.
- To hold monthly meetings with informative programs.
- To offer field trips of interest to local gifted students.
- To create parent liaisons for each school in the district.

Suggested duties of your group's Executive Board or Steering Committee could include having the President call periodic Board meetings, which could be held one hour before general meetings. For continuity it is suggested that the office of Vice President advance to the office of President and that the Past President serve on the Executive Board as an advisor. A Past President is a good choice for the Procedures Chair. Other duties could include:

President:

- ✓ Conducts meetings
- ✓ Represents the organization to the community
- ✓ Attends meetings that are important to gifted policy

Vice President:

- ✓ Coordinates monthly speakers
- ✓ Fills in for President

Secretary:

- ✓ Records minutes
- ✓ Correspondence
- ✓ Keeps database of members

Treasurer:

- ✓ Collects dues, pays bills
- ✓ Provides monthly updates

Procedures Chair:

- ✓ Roberts Rules, By-Laws, precedent

Communications Chair:

- ✓ Prepares publicity materials and newsletter
- ✓ Updates website regularly

Duties of Local School Liaisons are also important. Choose a parent from each school in the district. That parent should have a gifted child in the school and should be willing to learn about gifted children and their needs. The representative's goal is to establish a strong rapport between the school and the organization's Executive Board. Responsibilities of the school representatives include:

- ✓ Educating themselves about the educational needs of gifted students and passing on this information to educators and parents.
- ✓ Establishing a good rapport with the principal and the teacher(s) of the school's program.
- ✓ Keeping current a list of the names and addresses of parents whose children are enrolled in the school's program.
- ✓ Serving on the telephone/email committee.

Appendix B. Sample Bylaws

AAGT is not setting forth any demands or requirements as to specifics, except that for IRS purposes your organization's **business year needs to be the same as AAGT's: start October 1st and end September 30th, and bylaws must include the paragraph about dissolution.** As long as an affiliate group's bylaws are not inconsistent with those of AAGT, they are acceptable. The requirement for written bylaws is sound practice in accordance with IRS regulations that govern tax-exempt charitable organizations.

To ensure that your affiliate group has a strong foundation for operation and decision-making, and as part of the process to affiliate with AAGT, your group needs to prepare written bylaws. This is a useful way to come to consensus on how to handle planning, commitments, duties, goals, and any unforeseen circumstances that might arise. Having written bylaws is especially important if your group plans to raise money and disperse it. Group officers need the legal protection of written bylaws that address financial issues for the voting of funds.

The sample bylaws are written for groups that organize within a particular school district by way of example only; of course any group of students, teachers, parents, administrators, counselors, psychologists, or others may organize in any way for the benefit of gifted and talented children.

Sample By-laws:

ARTICLE I – Name. The name of this organization shall be the _____, (*your organization's acronym*), an affiliate chapter of the Arizona Association for Gifted and Talented (AAGT).

ARTICLE II – Purpose.

Section 1. The organization will support and strive to improve learning opportunities for gifted and talented students in the district(s).

Section 2. The organization will inform district parents, teachers, administrators, and counselors about the needs of and opportunities for gifted and talented students, and related resources and information.

Section 3. The organization will facilitate continuing and productive communication between parents, students, teachers, administrators, counselors, and the community concerning gifted education in the district(s).

Section 4. The organization will affiliate those interested in gifted education in their local community within the state-wide organization known as Arizona Association for the Gifted and Talented (AAGT), which disseminates information about gifted and talented and pursues legislation that truly benefits children who are gifted and talented and the professionals who assist them.

ARTICLE III – Membership, Dues, and Assessments

Section 1. Membership shall be open to all parents, members of the community, and school personnel who are interested in the education of students who are gifted and talented.

Section 2. The initial and annual membership fee for the organization to affiliate with AAGT shall be in accordance with the current dues structure of AAGT. This organization may decide to assess individual membership fees of its own members by a majority vote of its executive board.

Section 3. All members of this organization shall be eligible to vote in elections (one vote per membership) and to hold office and serve as chairs in this organization.

ARTICLE IV – Officers and Duties

Section 1. The officers of this organization shall be chair/president, vice-chair/vice-president, secretary, treasurer, and _____. There shall be at least three (3) officers, including a president and treasurer (who shall not be the same individual).

Section 2. The terms of the officers shall be _____ year(s). Election of the officers, by the general membership, shall occur during _____ of each year and the elected officers shall assume office at the meeting.

Section 3. Nominations for officers shall be made by the general membership before or at the _____ meeting.

Section 4. The duties of the officers shall be as follows.

The chairperson shall preside at the organization’s business meetings, serve as chair of the Executive Board, and serve in all other manners directed or authorized by these by-laws and their amendments.

The vice-chair shall serve in the capacity of the chair in the absence of the chair. In the case of vacancy of the chair, the secretary shall serve out the remainder of the term as vice-chair, and the Executive Board shall appoint a secretary from the general membership.

The secretary shall keep an accurate record of the proceedings of all meetings of the organization and of the Executive Board; shall be prepared to refer to minutes of previous meetings; shall conduct all necessary correspondence of the organization at the direction of the Executive Board; and shall notify all Executive Board members of Executive Board meetings.

The treasurer shall receive all money for the organization and shall deposit it in the name of the organization in a bank approved by the Executive Board; shall keep an accurate record of all receipts and disbursements; shall present a statement of account at every business meeting of the organization and at other times when requested by the Executive Board; and shall make a full annual report to the organization. The treasurer and the chair shall be authorized to sign checks issued by the organization. Disbursement of funds in excess of \$ ___ must be authorized by the Executive Board.

ARTICLE V. The Executive Board

Section 1. The Executive Board shall consist of all officers of the organization and the chairpersons of the standing committees.

Section 2. The Executive Board shall transact all necessary business between regular organization business meetings as well as any other business that may be referred to it by the organization. It must authorize the payment of any bill exceeding \$ ___ not previously authorized or included in the budget. It shall create such standing committees as are deemed necessary to carry on the work of the organization.

Section 3. The Executive Board shall meet as deemed necessary to conduct business but at least _____ times a year. Special meetings of the Executive Board may be called by the chair/president, or a special meeting requested in writing by members of the Executive Board shall be honored.

Section 4. A majority vote of the Executive Board members present shall be deemed adequate and acceptable for conducting and transacting business.

Section 5. When a board member fails to attend ____ or more consecutive meetings without notifying the secretary or chair of the Executive Board, that office shall be declared vacant by the Executive Board.

Section 6. Each member of the Executive Board, upon expiration of his or her term of office or in the event of his or her resignation, shall turn over to his or her successor without delay all pertinent record books, notebooks of the office, funds, and other materials pertaining to the office.

Section 7. All decisions made by the Executive Board shall be presented to the general membership and voted on when appropriate.

ARTICLE VI – Standing Committees

Section 1. Chairpersons of standing committees shall be elected from the general membership.

Section 2. The terms of office for chairpersons of standing committees shall be one year or until their successors are elected.

Section 3. Each standing committee chairperson or special committee chairperson may select as committee members any member of the organization in good standing.

ARTICLE VII – Meetings

Section 1. Meetings of this organization shall be called by the Executive Board at least ____ times per year.

Section 2. A majority vote of members present shall be deemed adequate to transact business. At least ____% of the members must be present at the meeting to constitute a quorum to transact business.

Section 3. The privilege of holding office or voting in an election shall be limited to members of this organization.

(NOTE: Your organization's by-laws may want to specify the different sorts of meetings that the organization can hold. Aside from initial organizational meetings, your organization may want to hold several Executive Board meetings, some small committee meetings with chairpersons appointed by the chair/president for specific tasks, and at least three informational meetings for all members during each year. "Nuts and bolts" business is best conducted at the Executive Board meetings with brief, general information such as a president's and treasurer's report and the like at the general membership meetings. See below for other meeting and event tips.)

ARTICLE VIII – Business Year. The organization's business year shall begin on October 1st of each calendar year and end on the following September 30th.

ARTICLE IX – Amendment to By-laws. The by-laws may be amended at any regular or special meeting by a vote of the members present, provided that notice, including the subject of the proposed amendment, has been given to the general membership in writing at least two weeks prior to the vote.

ARTICLE X – Dissolution. In the event of dissolution, all assets of this organization shall be transferred to an organization organized and operated exclusively as a tax-exempt organization as defined by the Internal Revenue Service under Section 501 (c)(3) of the Internal Revenue Code.

Appendix C. Additional Tips for Successful Meetings and Events.

Here are some additional tips for successful meetings and events, networking and communications, and fundraising. If you would like to consult with an AAGT Board member about your organization's specific needs, please feel free to contact the AAGT office manager at officemanager@azgifted.com. The following information was excerpted from parent materials prepared by the Florida Gifted Network, an NAGC affiliate.

To attract the most people to your meetings and events, consider doing the following:

- Publicize meetings and events in local newspapers, flyers, group emails and newsletters, and/or notices sent home with students.
- Have a speaker on a topic connected with giftedness or how to support giftedness. You can also arrange for a panel of speakers to address a specific topic, such as local teachers or administrators, psychologists, or other professionals who work with gifted and talented. The AAGT Board of Directors is also available to assist your organization with locating and arranging guest speakers, and may be available as speakers themselves as well.

Successful meetings incorporate these ideas:

- Choose the best time of day, best day of the week, and best location to obtain the biggest audience.
- Provide an agenda.
- Use name tags and include the school name.
- Use sign-in sheets with names, addresses, phone numbers, schools, and an opportunity to sign-up to help the parent group in some capacity.
- Make newcomers feel welcome. Assign members to new members and guests.
- The group leader MUST act as a good facilitator or consider bringing in someone to facilitate the meeting. Keep to the agenda. Provide a BIN sheet in which to add questions, comments, further action to take or discuss, but that is not on the agenda.
- Offer refreshments or do a pot-luck lunch, supper, or offer dessert.
- Acknowledge VIPs in the audience.
- Include teachers of the gifted, school board members, and school and district personnel in your invitation list.
- Send a press release announcing your meeting.
- Seek permission to "advertise" the meeting through the school system: their website, administrative bulletins and newsletters, flyers sent out to parents of the gifted via the district's inter-office system. Some districts actually will do this.
- Consider doing the work of the board/steering committee separate from the public meeting.
- At Steering Committee/Board Meetings, share short reports from different schools about their gifted programs, activities, and ideas.
- Send meeting announcements early and consider developing a calendar of meeting dates early in the year.
- Provide handouts for parents at all meetings (and so note in any publicity for the meeting). Parents love to receive resource information and many will come to a meeting just for that reason. Make sure

that this is done even at your Steering Committee/Board Meetings. These parents also need something in return for attending the meeting. Bribery helps.

- Do not get bogged down in personal horror-story telling. Nothing can paralyze the group quicker than to turn each meeting into a gripe session. Do allow an organized way of letting parents let off steam: break into small group discussions with a facilitator and recorder, stay after the meeting to share stories, pass around written surveys, etc. Find ways to hear gripes in an arena that creates ideas for positive action.
- Offer meeting topics of general interest to a large group of parents.
- Be on the lookout for positive parents and tap them for your steering committee or board positions.
- Take simple minutes which explain what was discussed, action taken or to be taken, who is responsible, next meeting dates underlined.
- Mail the unapproved minutes to key people who were not in attendance at the meeting to keep them up to date.
- Write "thank you" notes to speakers, presenters, and to anyone helping to host the event.
- Don't have a meeting just to have a meeting; make it meaningful, or don't have one.
- If you find parents are not coming to your meetings, try to figure out why: late notices, not getting notice, bad time, poor topic, distant location, just too busy..... Then determine if the meetings are worth the effort or if sharing the information via a newsletter would be an easier way to accomplish your goals.

Hold workshops to educate your members. Speakers can be teachers of the gifted, a school district gifted coordinator, private psychologist university professor/trainer for teachers of the gifted. Consider topics such as:

- Underachieving Gifted Learners
- Gifted and LD (or ADHD)
- Gifted Girls
- Middle School/Adolescent Gifted
- Perfectionism
- Social and Emotional Needs of Gifted Learners
- Nurturing Creativity in Your Child
- So My Child is Gifted, What Now?
- Options for Gifted Learners – an overview of appropriate services for gifted learners
- Resources and Summer Programs that are appropriate for gifted learners
- The Internet and Gifted Learners
- High School options for gifted learners
- College Comes Sooner than you think
- Successful Advocacy at school, district, and state levels

Networking and Communications:

Nearly all AAGT affiliates have newsletters, particularly via email, for members. Newsletters allow affiliates to provide members with important information about meetings and events and other local programming for gifted and talented, and to relay information provided by AAGT that is useful for the organization and its members to stay connected to Arizona's gifted community.

Here are some recommendations to consider for successful newsletters:

- Include special features such as special recognition of local individuals, book reviews and recommendations on the subject of giftedness, spotlights on local programs and services for the gifted and talented, upcoming conferences, events, competitions, etc.
- For communities in which printed newsletters rather than email are preferred, consider seeking assistance from school districts, local printers, and businesses to help fund printing and mailing costs. When you have non-profit status (i.e., a tax ID number for non-profit organizations) you may apply for a bulk rate mailing permit through your local branch of the U.S. Postal Service.
- Keep newsletters short, one or two pages at the most, and be sure to include contact information for your officers.
- Try to include as many important “players” in your community on your newsletter mailing list, such as school district governing board members, administrators, gifted teachers, counselors, and psychologists. The goal is to educate and inform your local community about the needs and opportunities for the gifted and talented.

It is also useful and prudent to communicate regularly with local school district officials, such as the governing board, the superintendent and other administrators, and teachers. Attend meetings, get involved, and demonstrate that your organization is interested in being a “team player”.

Fundraising:

As organizations mature, they inevitably consider fundraising. Funds are essential for gifted classroom supplies, training of teachers and counselors, scholarships for gifted students to attend gifted-related events or summer camps, etc.

Some affiliates have been successful with the following fundraising tactics: holding silent auctions, used book sales, game booths at school carnivals, selling food at events, hosting workshops for parents or students, sponsoring theatre trips, hosting speaking events with state experts or nationally-recognized experts in the field of gifted and talented. You may also consider seeking corporate donations from local businesses. Businesses should be asked to donate precise amounts for specific purposes. Requests for internships, field trips, classroom materials that are not funded by the local school district are appropriate appeals to make. A business needs to know that it is providing funding for specific items that the regular school taxes cannot cover. Remember that personal access to key business decision-makers is what will be successful. Also remember to describe to businesses the return on their investment; business leaders want to see some future benefit for their interests, besides a tax break, resulting from their donation. They will be glad to know that they are investing in the children who will be the future leaders, idea-people, and creative problem-solvers of business.

AAGT does not advise selling door-to-door, especially if the sellers are children. AAGT recommends checking with your local school district at an early stage to see if a desired fundraiser is permissible.

Appendix D. Getting the Message Out:

Here are some tips for news releases:

HOW TO CONTACT

- Phone
- Mail
- E-mail
- Fax
- Drop off in person

WHEN TO ALERT THE MEDIA

- Unique Events
- Service Projects in Community
- Recruiting Events
- Human Interest Possibilities
- Fund Raising Events
- Award Ceremonies

WHAT TO INCLUDE IN THE NEWS RELEASE

- All the facts (“5 W’s & H”)
 - Who
 - What
 - Where
 - When
 - Why
 - How
- A quote from a participant
- Contact name for more details
- Personal Note
- Pictures (Color prints are o.k.; don’t ask them to be returned)
- Keep it simple

WHAT THE MEDIA WILL USE

- The New York Times motto on the mast says: “All the news that’s fit to print”
 - When dealing with most newspapers: “All the news that fits we print”
- FACTORS DETERMINING WHAT THEY WILL USE
 - Amount space/time available
 - Time of year
 - TV air time is constant
 - News Departments are always busy

TIPS FOR SUCCESSFUL RELEASES

- Institute a Media Relations Coordinator Job
- News Releases must look important
- Be timely and newsworthy
- Get to know your ‘media contacts’

- Include personal note
- Get students involved
- Tell TV about action possibilities
- Include the time of peak action
- Contact in advance of event
- Don't assume anything
- Keep the News Release to one page
- Use Official titles
- Include number of participants
- Send thank-you notes after event
- Send a small token of appreciation:
 - At the time of the Release
 - After the event
 - Pencil/Pens
 - Stickers
 - Patch
- Invite a media personality

You will have more success if you keep some simple principles in mind:

- For smaller, community-oriented newspapers: the easier it is for the newspaper, the more likely they will publish. Your press release is more likely to be published as a story if it is written like the stories already being published in the newspaper.
- For bigger newspapers: conflict gets published, human interest less so. A “story” in the journalism lexicon is just like you learned in English class: it has a protagonist and antagonist, a conflict. The difference is a newspaper is willing to publish a story simply reporting the details of the conflict. In fact, the story reporting the resolution of the conflict often is not as interesting as the conflict itself, so it less likely to be published. They are willing to carry stories about events, but will give them little space.
- A specific reporter covers education for your town. (In most instances, the reporter who covers school sports is likely not the one covering education.) The reporter has a long list of towns and topics to cover, so there is very little time for your story. Read related stories about your school district and note the name of the reporter. Go to School Board meetings, which are your best chance to meet that reporter. If you can't find a reporter name, contact the school staff member associated with activities that are being published and ask for their advice on how to get stories published, including whom they send it to and what their needs are.
- Call the editor and ask for guidance on what kinds of stories they like to publish. Ask if there is a specific reporter you should talk with. Editors will gladly pass you to someone who works for them, if possible.
- To explore more detail on this topic, see if your local library has a book about writing press releases.
- Timing is important: the news release has to be timely. This means you have to have already written and sent the press release at the time of the event. Find out what the deadlines are for all media and calendar formats. Weekly newspapers typically have a deadline three days before the newspaper appears on your doorstep.
- If you have more than one newspaper covering your school district, you might find you will be published more often if you develop just one of the newspapers as your exclusive location.

COMMON NEWS RELEASE PROBLEMS

- Not enough information
- Incomplete information (e.g. failure to include date/time or location details)
- No contact information
- No follow-up call
- No media notification

WHAT IF NO COVERAGE APPEARS

- Demands are high, space is tight
- Resources are limited.
- Don't give up. Don't burn any bridges. Try again.
- Many times news coverage is a matter of luck!!
- Remember: "Never Argue with Anyone who Buys Ink by the Barrel"

SAMPLE PRESS RELEASE

NEWS RELEASE NEWS RELEASE NEWS RELEASE

Add a personal note to the Editor requesting news coverage.

Date: Today's Date

To: News Editor
Name of Publication

From: Name / Title / Address / Phone / Fax / Email

ACTION HEADLINE GOES HERE

****ANSWER THE "5 W'S & H" IN THE BODY OF YOUR NEWS RELEASE.**

****INCLUDE QUOTES IF POSSIBLE**

****MAKE THE RELEASE AS INTERESTING AS POSSIBLE.**

WHO:

WHAT:

WHEN:

(PLUS THE BEST TIME TO ATTEND THE EVENT FOR NEWS COVERAGE PURPOSES)

WHERE:

WHY:

HOW:

Add a "Quote" or Education Fact, such as:

"Did you know that there are more than X,XXX gifted students served in the x Schools?"

For more information: President xxxx xxxxxx @ 599-xxxx, xxx@xxx.xxx

ORGANIZATION NAME & ADDRESS

(Special thanks to the Ohio Association for Gifted Children for use of this information.)

Appendix E. Additional IRS-EIN and Form 990-N Suggestions:

To become an affiliate group that collects dues, the contact person for the group must obtain an EIN from the IRS by completing an SS-4 form. Your group will also be required to complete a brief, on-line "e-Postcard" known as IRS Form 990-N each year. This Appendix section answers questions about both.

Q - What is an EIN ?

A - An EIN is a nine-digit number (for example, 12-3456789) assigned to sole proprietors, corporations, partnerships, estates, trusts and other entities for tax filing and reporting purposes. The information you provide on this form will establish your business tax account. An EIN is for use in connection with group business activities only. Do not use your EIN in place of your personal social security number (SSN).

Q – How do we apply?

A - You can apply for an EIN on-line, over the telephone, via fax or through the mail. See the Form SS-4 instructions at www.irs.gov/pub/pub/irs-pdf/iss4.pdf for further details. Click on EIN at the top of the page. Then follow the instructions (also discussed below).

- To apply on-line, use the on-line EIN application available at www.irs.gov website.
- To get an EIN over the IRS's toll-free telephone number, call (800) 829-4933. Hours of operation are 7:00 a.m. to 10:00 p.m. local time, Monday through Friday. See the EIN Toll-Free Telephone Service link at www.irs.gov for more information.
- To request an EIN via fax, 24 hours a day / 7 days a week, dial the fax number at the location accepting applications from your state. The instructions on the Form SS-4 indicate which location will accept your faxed request.
- To receive an EIN through the mail, complete Form SS-4 . The instructions on the form provide the correct address.

Third parties can receive an EIN on a client's behalf by completing the new "Third Party Designee" section and obtaining the client's signature on Form SS-4. This avoids having to file a Form 2848 (Power of Attorney) or Form 8821 (Tax Information Authorization) to get an EIN for their client.

Q - Do we need to file any additional forms with the IRS?

A – Once you have completed the EIN form and shared it with AAGT, all additional IRS filing is taken care of by AAGT. However, you will still need to complete the Form 990-N each year (see below).

Q – Is there some other way to get on-line help for all this?

A – Yes, Tax9er.com has developed a Tax ID Number Form Genie to assist you in preparing your IRS SS-4 Application. IRS estimates that preparing the form takes 94 minutes but our users complete in an average of 9 minutes.

See: https://www.tax9er.com/fg/bin/fg.pl?affiliate_id=%25affiliate_id%25&app_id=fss4

Benefits include: online help and IRS instructions provided at every step, validation performed to ensure your application is error-free, multiple delivery options to IRS including phone-in, fax, or mail, significantly reduced time to complete application, and e-mail confirmation of IRS receipt with fax delivery option.

When you have completed the data entry steps, you'll be given the option to phone in or fax in your completed application. Phoned applications to IRS TELE-TIN are assigned EINs during the time of your call (during normal business hours).

Faxed applications are processed by IRS within 4 business days and your EIN will be faxed to you. Fax is the preferred delivery option after hours, on weekends and holidays and for users who wish to avoid a telephone call to IRS.

Cost - You may preview the Tax ID Number Form Genie at no cost. If you wish to print your completed application or have them fax it directly to the IRS for you, the cost is \$12.00.

Q – What about the SS-4 Form?

A – Here are some details based on the IRS version of the form revised July 2007. You will be filling in lines 1, 3, 4a-6, 7a and 7b, 8a, 9a and 9b, 10-18

1. Affiliate group name
3. Contact person's name
- 4a-6. Contact person's address, etc.
- 7a. President's name
- 7b. President's SSN
- 8a. Check "No"
- 9a. Check box that reads "Other" (specify)>write in nonprofit organization-educational
- 9b. If your organization is also a non-profit corporation through the AZ Corporation Commission, write "Arizona"
10. Check box that reads-Other (specify)> write in educational Group Exemption Number (GEN)> 3049
11. Date business started (put date of affiliation)
12. Write in September
13. Under "Other" write "0"
14. Check the box "No"
15. Write in N/A
16. Check the box that reads "Other"(specify)> write in educational
17. Write in "educational non-profit services"
18. Check box "No"

Write name, Sign and Date, provide telephone and fax information if applicable.

Q – What information is asked on IRS Form 990-N (the "e-Postcard")?

A - Here is what you will be required to file for the IRS Form 990-N e-Postcard:

- Organization's legal name and any other names your organization uses,
- Organization's mailing address,
- Organization's website address (if applicable),
- Organization's employer identification number (EIN),
- Name and address of a principal officer of your organization,
- Organization's annual tax period,
- A statement that your organization's annual gross receipts are still normally \$25,000 or less, and
- If applicable, a statement that your organization is terminating (going out of business)

Appendix F. Sample Treasury Report

Affiliate Name

Date of Treasurer's Report

Name of Treasurer

Beginning Balance \$ 950.61
Deposits..... + \$67.00
 2007/8 Membership Dues for 3 Members @\$15.00 each \$ 45.00
 Super Saturday Art Contributions.... \$ 16.00
 Chess Contributions \$ 6.00
Expenditures - \$25.00
 (Reimbursement to David Jones for
 Art Super Saturday Materials) \$25.00
Ending Balance \$ 992.61

Appendix G. Sample Membership Report

Affiliate Name
June 7, 2008 Membership Report
Name of Secretary

2007/2008 Paid Members as of April 5, 2008	29
2007/2008 Local Members Added –	Jane Smith John Doe Nancy Jones
2007/2008 AAGT Members Added -	Lea Pines Jeff Atkins Nancy Jones
2007/2008 Local Members as of June 7, 2008	32
2007/2008 State and Local Members as of June 7, 2008	35

Appendix H. Sample Receipt for Monetary or Material Donation

(Name of Your Organization)

Date _____

Affiliate Name _____

Received of _____

Amount/Detail _____

Affiliate Officer's Signature and Title

(Organization name) is an affiliate chapter of the Arizona Association for Gifted & Talented (AAGT), which are both tax-exempt under Section 501(c)(3) of the Internal Revenue Code. (Organization name) tax ID # xxxxxxxxxx. Donations are tax-deductible to the extent permissible by law.

Appendix I. Sample Financial Statement

Affiliate Chapter Organization Name

2007/2008 Financial Report

Name of Treasurer

Beginning Balance as of October 1, 2007	\$ 830.84
Total Deposits to Date	+ \$230.00
Membership dues	\$ 200.00
Donations	30.00
Total Expenditures to Date	- \$411.38
Local Club Assistance	
Honorarium(s).....	\$ 27.00
Postage for newsletter and	
Super Saturday notice cards.....	249.00
Picnic Reimbursement	23.61
Newsletter Printing	22.52
Postage/Mailing Supplies Reimbursement	75.25
Bank checks	14.00
Ending Balance as of August 5, 2008	\$ 649.46
Projected Deposits through September 30, 2008	+ \$30.00
Membership/donations.....	\$ 30.00
Projected Expenditures through September 30, 2008.....	- \$210.02
Super Saturday reminder cards	\$ 187.50
Newsletter printing.....	22.52
Projected Ending Balance as of September 30, 2008	\$ 439.44

Appendix J. AAGT Affiliate Chapter Agreement Form



**Arizona Association for the Gifted and Talented
Affiliate Chapter Membership Agreement**

Submit this completed form annually to AAGT with dues (\$50 initial, \$50 each year thereafter) and required attachments to AAGT, P.O Box 51772, Phoenix, AZ 85076. Questions? Contact officemanager@azgifted.com.

Name of Organization: _____ Date: _____

Group Name Acronym: _____ Type of Group (e.g. parent, coordinator): _____

Contact Person: _____ Phone: (____) _____

Fax: (____) _____ Email: _____

Address: _____ City, State, Zip: _____

Total number of members as of date of agreement: _____

School district(s) in which your members reside: _____

County in which your members reside: _____

Legislative district(s) in which your members reside: _____

Legislation Contact person (name, phone, & email for legislative action):

Annual dues enclosed, made payable to AAGT: New (\$50) Renewal (\$50)

Your organization should review its mission/goals and bylaws annually to revitalize your activities and focus your efforts effectively. Check to see that your bylaws and your current procedures are in line with one another, and it is suggested that you keep a notebook of your business meeting minutes, bylaws, activities, etc.

Affiliate Bylaws: please check one

- No changes have been made to our bylaws since we last submitted a copy to AAGT.
- We have already forwarded a revised copy of our bylaws. Date forwarded: _____
- We are attaching a current copy of our bylaws as revised/amended.

Federal Employer Identification Number (EIN) Information: please check and complete one:

- Our organization's EIN # is _____.
- Our organization's EIN # was applied for on _____ and will be sent to AAGT as soon as we receive it from the Internal Revenue Service.
- Our organization has previous 501c3 non-profit status. Our Tax ID number is _____ and a copy of our previous Federal Tax Exempt Letter is attached or on file with AAGT.
- Our organization will not be collecting dues.

Ways you communicate with:

Members: _____

School District: _____

Community: _____

Electronic-newsletter? Yes No Number of times per year _____

**Please add AAGT addresses to your distribution list (see item 6 for details).

What are the three most important ways AAGT can assist you in the coming year?

What issues are you most concerned about?

List the names and contact information of members of your organization who might be willing to be a resource for other affiliate chapters:

OFFICERS (minimum of three required)

Name: _____ Position: _____

Address: _____

Phone: (____) _____ Fax: (____) _____ Email: _____

School District: _____ County: _____ Region #: _____

Name: _____ Position: _____

Address: _____

Phone: (____) _____ Fax: (____) _____ Email: _____

School District: _____ County: _____ Region #: _____

Name: _____ Position: _____

Address: _____

Phone: (____) _____ Fax: (____) _____ Email: _____

School District: _____ County: _____ Region #: _____

Name: _____ Position: _____

Address: _____

Phone: (____) _____ Fax: (____) _____ Email: _____

School District: _____ County: _____ Region #: _____

By signing below as a duly authorized representative of our organization, we, the _____, (referred to below as “our organization”) agree to the following:

1. Abide by the bylaws of Arizona Association for Gifted and Talented (AAGT) and the bylaws of our organization in order to meet group exemption requirements under Section 501c3 of the Internal Revenue Code for tax exemption purposes;
2. Have our own bylaws in accordance with the purpose of AAGT bylaws (copy available at <http://arizonagifted.org>), elect our own officers, and organize our own programs;
3. Maintain the integrity of the purposes and goals of AAGT and support policy and programs adopted by the AAGT Board of Directors;
4. Authorize our organization’s name to be used by AAGT as an Affiliate Chapter of the state organization (fore example, on the AAGT website or in a newsletter);
5. Send a representative to all AAGT Affiliates meetings that are required;
6. Send copies of our organization’s newsletters to the AAGT (officemanager@azgifted.com).
7. Submit in a timely manner an AAGT Affiliate Chapter Agreement upon first time application and each year thereafter to renew affiliation, as well as all forms required by the IRS, including annual completion of IRS Form 990-N;
8. Be in full compliance with the requirements of the AAGT Bylaws and this agreement, and in the event that AAGT notifies our officers in writing of noncompliance, come into full compliance within thirty (30) days of the date of the written notice or understand that the AAGT Board of Directors may revoke our charter as an affiliate chapter;
9. Distribute, in the event of dissolution of our organization, all monies and other assets, real and personal, of the organization to the AAGT Board of Directors to be held in trust until such time as the affiliate chapter is reorganized, up to five years, at which time monies will be absorbed by AAGT.
10. Indemnify AAGT, its directors and officers, and hold them harmless from any payments, losses, damages, penalties, claims, judgments, suits, settlements, expenses, and disbursements (including reasonable costs of investigation and attorneys fees) of whatever kind or nature that may be imposed on AAGT, its directors or officers, as a consequence of or in connection with any activities of our organization or anyone whose acts such organization may be liable or responsible.

AAGT Affiliate Chapter known as _____

By it’s Duly Authorized Representative:

Print Name _____ Title _____

Signature _____ Date _____

Please make a copy of this form for your files, attach a copy of your ratified bylaws, your current financial statement, list of activities, and dues and return to AAGT.

For OFFICE USE ONLY:

Approved by AAGT Affiliate Chapter Coordinator _____ Date: _____

Appendix K. Quotes to Share

Whenever you have the opportunity, share some “quotable quotes” with other parents, educators, and community members. Whether including quotes on the bottom of your emails, on your web page, in your e-newsletter, or at your meetings, this can be a very effective way to subtly and indirectly continue your education of your community. Here are some of our favorites:

"Students who achieve A's based on what they have already learned are gaining daily practice in underachievement." --Linda Silverman

“Every child deserves an equal opportunity to struggle.” (Mary Landrum);

"Expecting all children the same age to learn from the same materials is like expecting all children the same age to wear the same size clothing." (Madeline Hunter);

"You can never hold a person down without staying down with him." (Booker T. Washington);

"Give me rigor or give me mortis!" (Michael Clay Thompson);

"Poor is the pupil who does not surpass his master." (Leonardo da Vinci);

"There is nothing so unequal as the equal treatment of unequals." (Justice Felix Frankfurter);

"The pupil who is never required to do what he cannot do, never does what he can do." (John Stuart Mill).

“Start where the learner is.” (John Dewey)

“I have no special talents. I am only passionately curious.” (Albert Einstein)

“Education is no the filling of a pail but the lighting of a fire.” (John Butler Yeats)

“All of us do not have equal talent, but all of us should have an equal opportunity to develop our talent.” (John F. Kennedy Civil Rights Address)

“Until every gifted child can attend a school where the brightest are appropriately challenged in an environment with their intellectual peers, America can't claim that it's leaving no child behind.” (Jan & Bob Davidson with Laura Vanderkam, *Genius Denied*)

"One can never consent to creep when one feels an impulse to soar!" (Helen Keller)

"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)

“Genius without education is like silver in the mine.” (Benjamin Franklin)