



# Handbook for Family & Affiliate Groups

(Revised 2022)

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# TABLE OF CONTENTS

## I. STAYING INFORMED

INTERNET ADVOCACY .....	3
“OHIOGIFT” .....	3

## II. HELP FOR FAMILIES AND COMMUNITY MEMBERS.....4

GUIDING THE GIFTED .....	4
HOW TO ADVOCATE FOR YOUR CHILD .....	4
<i>Communicating with your Child’s School &amp; Teacher</i> .....	4
WHAT IS THE LAW?.....	4
WHAT ARE YOUR RIGHTS?.....	5

## II. HELP FOR FAMILY AND COMMUNITY GROUPS .....6

ORGANIZING A FAMILY AND COMMUNITY SUPPORT GROUP .....	6
<i>Why Should Families and Community Members Organize?</i> .....	6
<i>How Should Families and Community Members Organize?</i> .....	6
<i>Pitfalls</i> .....	7
<i>Cultivate</i> .....	8
SAMPLE PURPOSE, GOALS, OBJECTIVES AND DUTIES FOR FAMILY GROUPS.....	9

## III. AFFILIATION WITH OAGC ..... 11

OHIO ASSOCIATION FOR GIFTED CHILDREN .....	11
BENEFITS TO OAGC GENERAL MEMBERS.....	11
BENEFITS TO AFFILIATE GROUPS .....	11
REQUIREMENTS TO BECOME AN OAGC AFFILIATE GROUP.....	12
RELATIONSHIP BETWEEN AFFILIATES AND OAGC .....	12
<i>Sample Constitution and By-Laws</i> .....	12
<i>Other Paperwork FAQs</i> .....	13

## IV. ADVOCACY ..... 14

ADVOCACY - FOR YOUR CHILD .....	14
ADVOCACY - LOCAL LEVEL.....	15
ADVOCACY - REGIONAL LEVEL .....	15
ADVOCACY - STATE LEVEL .....	16
HOW AFFILIATE GROUPS CAN HELP EDUCATE LEGISLATORS.....	16

## APPENDIX I: SAMPLE CONSTITUTION ..... 17

## APPENDIX II: SAMPLE BYLAWS..... 19

## APPENDIX III: GETTING THE MESSAGE OUT ..... 21

TIPS FOR NEWS RELEASES .....	21
SAMPLE PRESS RELEASE .....	23

## APPENDIX IV: OAGC FORM AND IRS-EIN INSTRUCTION ..... 24

## APPENDIX V: OAGC AFFILIATE FAQs ..... 24

## APPENDIX VI. SAMPLE FORMS ..... 25

## APPENDIX VII. AFFILIATE INFORMATION FORM ..... 29

## APPENDIX VIII. SEED MONEY REQUEST FORM ..... 31

## I. STAYING INFORMED

### INTERNET ADVOCACY

Sharing information through email [listservs](#) is an effective way to stay abreast of gifted education concerns, as well as to find resources and ask questions. Many knowledgeable members generously share their experiences.

Directions for joining the following two “listservs” are also available at the advocacy link on the OAGC website at:

[www.oagc.com](http://www.oagc.com).

#### **“OHIOGIFT”**

OHIOGIFT is an e-mail list for Ohio intended to serve Ohio’s gifted education community. It is open to Families, educators, college and university persons and community people. However, it is an open list, meaning membership is not restricted: anyone can join. (This list now has members from several states and Australia!)

OHIOGIFT serves two purposes. First, we share information, ideas and concerns that are especially important to Ohio’s gifted community – for example, identification, emotional concerns, curriculum issues, and family and community concerns. Secondly, it serves as a place to post meeting announcements of interest to the Ohio community interested in gifted education. *If you have e-mail, you can join OHIOGIFT.*

1. To join Ohiogift, begin by simply clicking on this link: <https://lists.service.ohio-state.edu/mailman/listinfo/ohiogift>
2. To have a message distributed to the OHIOGIFT list, subscribers must send the message to the following address:  
[ohiogift@lists.service.ohio-state.edu](mailto:ohiogift@lists.service.ohio-state.edu)
3. Subscribers can remove themselves from a list by sending mail by looking at the directions at <https://lists.osu.edu/mailman/listinfo/ohiogift> or by contacting Art [Snyder44@cs.com](mailto:Snyder44@cs.com) .
4. Art Snyder, list manager, is available for questions or comments: [ArtSnyder44@cs.com](mailto:ArtSnyder44@cs.com).

## II. HELP FOR FAMILIES AND COMMUNITY MEMBERS

### GUIDING THE GIFTED

Guiding a gifted child is an adventure. Your first stop should become acquainted with the Ohio Association for Gifted Children (OAGC) Family and Community Division and download a copy of the Booklet: “What to Expect When You’re Raising a Gifted Child.” This wonderful booklet: defines giftedness according to Ohio guidelines; helps families understand the terms used by educators; describes the characteristics of gifted children; dispels myths; offers tips for helping your child succeed; describes some educational program options you can request in your district; offers resources for outside learning opportunities; suggests how to advocate for your child’s needs; and lists resources, including websites, books, articles, catalogs and membership in OAGC.

To begin your online search for resources, explore [www.oagc.com](http://www.oagc.com), [www.Hoagiesgifted.org](http://www.Hoagiesgifted.org) and [www.nagc.org](http://www.nagc.org) .

If you are looking for a family and community group in your area, clicking our affiliates link at [www.oagc.com](http://www.oagc.com) or calling OAGC office at 614-337-0386 are great places to start! These groups offer support, information, and discussions with other families and communities supporting gifted children and offer wonderful ways to pool resources for the benefit of gifted children.

You will find more information about the OAGC Family and Community Division and Affiliate Family groups in Section III. AFFILIATION WITH OAGC.

### ADVOCATING FOR YOUR CHILD

#### *Communicating with your Child’s School & Teacher*

Communication is the first (and most essential) step in ensuring that your child’s needs are addressed in the classroom. You can find suggestions about how to navigate communication in Joan Franklin Smutny’s article, “Communicating Effectively with your Gifted Child’s School” at:

<http://www.nagc.org/sites/default/files/Family%20CK/Smutny%20Communicating%20Sept%202002%20PHP.pdf> .

When you have a concern, first, make an appointment with the teacher to discuss the matter. Offer specific details that explain your concern. If you don’t hear back after three tries, then contact the principal for a meeting. Remember: all parties involved (school, teacher(s), administrators, and families) seek the child’s best. Be persistent. Be diplomatic.

You will need to learn a little about the terms used in education in order to communicate with teachers; therefore, educate yourself by looking at <http://www.hoagiesgifted.org/acronyms.htm>.

To learn more about how to be a successful advocate for your child, see Section IV. ADVOCACY.

### WHAT IS THE LAW?

Ohio's school districts are **not** required to **serve** gifted children by law, but they **are required to identify** students’ giftedness in grades K - 12. In 1999, the Ohio General Assembly passed legislation that updated the process for identifying Ohio's gifted students. The Law (also called the Ohio Revised Code) specifies, in general terms, how gifted students are to be identified and how they *may* be served. The law has been updated occasionally throughout the years, most recently in 2020. New changes include the Ohio acceleration policy; professional development requirements for regular education teachers serving the gifted; requiring districts to spend gifted funds on gifted students; and requiring the Ohio Department of Education to post district gifted expenditures and other information on the ODE website. Additionally, the Gifted Rule (or Ohio Administrative Code) provides the specifics that must be followed in identification. The Rule also provides specifics on how districts may serve gifted children. Ohio districts **must** comply with both the Law and the Rule. To read the Law and Rule, go to the Rule and Law link at <https://oagc.com/gifted-rule-and-law/>. (The rule was updated last in 2017 but will be updated once again in 2023.)

## WHAT ARE YOUR RIGHTS?

The law requires districts to identify students; however, districts may (but are not required to) provide gifted services (such as cluster grouping, pullout classes, acceleration, gifted teachers, etc.). Although most districts make their best efforts to serve gifted children, districts encounter limited resources and limited enforcement of the Rule or the Law. As you read about gifted children's rights below, keep in mind that while a district may not be offering all of the items below, families who educate themselves and learn to advocate for gifted students can experience excellent results for their children.

The Rule states the rights of gifted families/students, as follows (paraphrased). Items in quotes are in language taken directly from the Rule.

- 1) The right to be identified. Families may make specific referrals. Districts have 90 days to do the assessment once they receive the referral.
- 2) The right to be notified within 30 days about screening or identification results.
- 3) The right to be notified within 30 days of the opportunity to appeal any decision about screening, identification, or placement in a program.
- 4) The right for families of students with special education needs, who are disadvantaged, or for whom English is a second language to have an explanation about how the district will ensure equal opportunity and access to identification and service.
- 5) The right for these same students to have special accommodations for the gifted ID assessment process.
  - "The district shall select instruments, from the approved list that will allow for appropriate screening and identification of minority or disadvantaged children, children with disabilities and children for whom English is a second language."
  - "Tests must be provided and administered in the child's native language or other mode of communication, unless it is clearly not feasible to do so."
  - "Tests are selected and administered so as to best ensure that when a test is administered to a child with impaired sensory, manual or speaking skills, the test results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual or speaking skills except where those skills are factors which the test purports to measure."
  - "Assessments must measure the specific area of gifted ability."
- 6) The right to have two opportunities for testing each year.
- 7) The right to have test scores from outside of the district accepted, if the assessments are on the Ohio Department of Education (ODE) list of approved instruments. (Please go to <http://education.ohio.gov/Topics/Other-Resources/Gifted-Education> for more information).
- 8) The right to have instruction and services that are consistent with the gifted child's education plans. While no specific law requires service, if the district does provide service, it must:
  - Base instruction on the individual's needs.
  - Provide a Written Education Plan (WEP) to guide the instruction.
  - Ensure equal access to service -- not pick and choose who is in the program. Districts may set placement criteria, but it must be uniformly applied.
  - "Subjective criteria such as teacher recommendations may be used to determine appropriate service placement but shall not be used to exclude a child from service in the superior cognitive and specific academic areas who would otherwise be eligible."
  - "The district shall provide families with periodic reports regarding the effectiveness of the services provided in accordance with the gifted child's educational plan."
  - Provide service in the appropriate area of identification. For example, a student identified as gifted in math shouldn't be provided with arts gifted services.
- 9) The right to withdraw children from gifted programs and services.
- 10) The right to have children reassessed.
- 11) The right to resolve disagreements between families and the district concerning identification and placement decisions.
- 12) The right to be informed by gifted coordinators about the characteristics and educational needs of gifted children.

## II. HELP FOR FAMILY AND COMMUNITY GROUPS

### ORGANIZING A FAMILY AND COMMUNITY SUPPORT GROUP

Families of the gifted can find amazing support with one another, and this support can be formal (as an OAGC affiliate) or loosely organized and informal. Below are some helpful considerations as you begin organizing.

### WHY MAY FAMILIES AND COMMUNITY MEMBERS WISH TO ORGANIZE?

Goals for organized families and communities of the gifted may include any (or all) of the following:

- ❖ 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 the community about the need for appropriate education for gifted students.
- ❖ To advocate alongside school administrators and teachers for implementation of appropriate gifted education.
- ❖ To become a link in the larger chain of state and national organizations.
- ❖ To provide social and enrichment opportunities for children. (Examples: field trips, Saturday enrichment programs, participation in newsletters, family groups, or play group concepts with monthly adventures or activities.)
- ❖ To support or provide resources for the district gifted program.

*Many times, family and community organizations are direct outgrowths of programs for gifted and talented students in the school systems. While maintaining a good working relationship with the school helps significantly, family and community groups often stay more effective by remaining independent of the district.*

### *How Does OAGC Suggest Families and Community Members Organize?*

**Step 1: Investigate** ~ Use the research and resources available to determine your goals.

- ❖ Read books, periodicals, and websites about gifted children and education. Know your facts! Be able to quote recent, relevant, and expert research results, as well as examples of what other districts are doing.
- ❖ Talk with other interested families in your district. Listen to each other and determine priorities. Consider involving all families who support able learners (i.e., families who want higher academic standards for their kids) and students identified in specific academic areas, in addition to those identified as cognitively gifted. (See the OAGC Family and Community Handbook “What to Expect...” for more information on identification. (The Family and Community handbook is under the publications link at [www.oagc.com](http://www.oagc.com))
- ❖ Contact your school administration and/or your Gifted/Talented (GT) Coordinator or Director, if you have one. Test the waters to determine receptivity. **Listen.**
- ❖ Contact other family and community groups in your area. There is usually a willingness to share experience.
- ❖ Contact state and national organizations to see what guidance and assistance is available.
- ❖ Be a diplomat; find out how you and your organization can help the administrator and the school district.

**Step 2: Begin the Organizing Process**

- ❖ Gather a group of like-minded people.
- ❖ Determine purposes and goals; put them in writing.
- ❖ Decide whether your group will stay informal or will become a formal affiliate. **Important:** *groups choosing a formal affiliation must follow all legal requirements listed on p. 8.*
- ❖ 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.
- ❖ Write and formally adopt a constitution and by-laws. **(See Appendices I & II)**
- ❖ Select an Executive Board or Steering Committee and family representatives/liaisons for each school.
- ❖ Establish regular meetings – decide on frequency, type and location.
- ❖ Arrange for first meeting.
- ❖ Determine membership dues and prepare a membership form.
- ❖ Prepare a budget: dues, expenses, fund-raisers, etc.
- ❖ Select officers – president, treasurer, secretary, program chair, newsletter editor, and others your group needs.

### **Step 3: Choose Your Meeting Format ~ Suggestions:**

- ❖ Have people at the door to greet arrivals. Have index cards, a Google sheet, 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. (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.

### **Step 4: Additional Considerations**

- ❖ Perception – remember that “perception is often reality”: do your best to keep strong public relations.
- ❖ Network and interact with other organizations on behalf of the gifted. Use News Releases (see appendices).
- ❖ Choose the widest possible appeal: do your best not to restrict membership.
- ❖ Connect with your school districts – look to your gifted specialists, coordinator(s), gifted director, or advisory council. Ask if the GT program will give your information to students and Families.
- ❖ Have a plan for fundraising and donations.
- ❖ Consider OAGC Affiliation – What are the advantages of being an affiliate of OAGC? (See Section III.)

### **Step 5: Look to the Future**

- ❖ Keep in contact with your school’s gifted staff (specialists, coordinator, and/or director), principals, superintendent and teachers with regards to services.
- ❖ Organize and publish a newsletter.
- ❖ Periodically evaluate your goals and your progress in meeting them.
- ❖ Share articles of interest with local newspapers and your family liaisons for each school.
- ❖ Unite the voices of families 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*. In general, you will not be assertive enough if the district does not think you’re being pushy – but be only as pushy as needed. 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.

### ***Pitfalls***

- ❖ *Expecting overnight success*. Realize that many administrators are unfamiliar with the needs of gifted students.
- ❖ *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 people doing all of the work.
- ❖ *Not clarifying volunteer jobs*. People get discouraged when they volunteer for a job that does not need doing.
- ❖ *Personality conflicts*. 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/her/their 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. Families of children who are not gifted have a difficult time understanding families of students who hear a different drummer. Develop an empathy for everyone's situations.
- ❖ *Political awareness*. Keep abreast of local, state, and federal legislation and keep members informed.
- ❖ *Focus*. 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 or community member 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 yourselves on them!**
- ❖ *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!*

***Legal Matters:*** To become an affiliate group, the contact person for the group must obtain an EIN from the IRS by completing an SS-4 form.

### **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).

In order to complete the SS-4 form go to [www.irs.org](http://www.irs.org). **Type in EIN in the search box at the top of the page.** Then follow the instructions. There are multiple ways to obtain an EIN including by telephone, online, fax, and by mail.

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

A – Once you have completed the EIN form and shared it with OAGC, all additional IRS filing is taken care of by OAGC to be included under the OAGC group exemption number. However, an annual filing of a 990 or e-990 will be necessary to remain an OAGC affiliate.

## **HELP WITH THE SS-4 FORM**

**You will be filling in lines 1, 2, 4a-6, 8a and 9-16**

1. Affiliate group name
  - 4a-6. Contact person's address, etc.
  - 7a. Contact person's name
  - 8a. Check the **No** box.
  - 9a. Check box that reads **Other nonprofit organization (specify)>educational**
  10. Check box that reads **Other (specify)> Group Exemption Number (GEN)> 5035**
  11. Write in the **date you are filling in the form**
  12. Write in **August**
  15. Write in **N/A**
  13. Write in **"0"**
  16. Check the box that reads **Other (specify)**, write in **educational**
  17. Write in **educational services**
  18. Check the box **NO**
- Add **signature** and **date**, include **telephone number** and **fax number** if applicable

**Remember: Be Aware. Be Patient. Be Persistent.**



## **SAMPLE: PURPOSE, GOALS, OBJECTIVES AND DUTIES FOR FAMILY GROUPS**

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

### **Purpose**

To determine the purpose, decide what you want to accomplish by forming this group. The following are a few examples:

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

### **Goals**

To determine goals, 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 families and teachers in understanding gifted children.
- ❖ To establish a legislative committee to promote legislative education and support on behalf of gifted children.

### **Objectives**

- ❖ To establish a mentorship program.
- ❖ To provide sharing opportunities for families 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 family liaisons for each school in the district.

### **Duties of group's Executive Board or Steering Committee**

The President should 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.

#### **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**

Choose a family or community member from each school in the district. That family or community member 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 families.
- ✓ 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 families whose children are enrolled in the school's program.
- ✓ Serving on the telephone/email committee.

### III. AFFILIATION WITH OAGC

**Ohio Association for Gifted Children** The Ohio Association for Gifted Children (OAGC) is comprised of families, educators and community members dedicated to meeting the educational needs of all gifted children in the State of Ohio. It has four divisions: Coordinator Division (for gifted coordinators – each district has to have one), Teacher Division, Family and Community Division, and Higher Education Division.

#### OAGC MISSION

**To promote and support the development of gifted students through dissemination of information, advocacy on their behalf, encouragement of affiliate organizations and to promote research and education for gifted children.**

**The gifted child is defined as one who shows exceptionally high ability in one of the following:**

- ✧ **intellectual capacity**
- ✧ **academic aptitude**
- ✧ **creative ability**
- ✧ **artistic talent**

Families and community members can become individual members of OAGC, as well as members of the Family and Community Division. Also, family and community groups can become affiliate groups of the OAGC.

#### BENEFITS TO OAGC GENERAL MEMBERS

- ✓ Conference Discounts: yearly teacher academies, annual statewide conference, coordinator workshop, Family and Community Day.
- ✓ Receipt of Publications: OAGC Review journal informational updates.
- ✓ Current Information: OAGC website, social media updates, opportunities to run for office.
- ✓ Scholarship Funding: opportunities each year to recommend gifted students for scholarships.
- ✓ Advocacy: promotion and monitoring of legislation affecting gifted students, updated information, a collective voice for the gifted.
- ✓ Company Discounts: All members can enjoy discounts from listed companies.

#### BENEFITS TO AFFILIATE GROUPS

- ✓ Access to OAGC Speakers and Regional Representatives.
- ✓ Coverage under the OAGC group exemption for tax-free status.
- ✓ Opportunity to apply for \$200 seed money for gifted education advocacy activities (See application for seed money in Appendix VIII.)
- ✓ Shared support with other OAGC Affiliate groups and networking with those groups.
- ✓ Access to state level leadership in gifted education.
- ✓ Annual orientation meeting with other affiliate groups.
- ✓ Advocacy alerts.
- ✓ Non-profit status (tax-exempt, 501(c)(3) organization).
- ✓ Rights to reprint columns from the Advocacy Corner of the OAGC Review as well as most articles from the OAGC website in affiliate newsletters and publications without specific permission, but with proper citation. (For other Review articles, please check with each author for permission and credit requirements to avoid violating copyright laws. See current rule and law located at [www.oagc.com](http://www.oagc.com).)
- ✓ Affiliate listing on the OAGC website.

## REQUIREMENTS TO BECOME AN OAGC AFFILIATE GROUP

- ✓ Draft, adopt and submit to OAGC a set of bylaws that contain an appropriate dissolution clause (see Appendix II for samples).
- ✓ Annually submit required forms to the VP for Affiliate Relations or OAGC Executive Director (see below).
- ✓ Obtain EIN number (See Appendix IV).

## RELATIONSHIP BETWEEN AFFILIATES AND OAGC

OAGC supports affiliate groups in the manner mentioned above, but does not monitor or suggest group activities or relationships. While affiliate groups are independent of OAGC, the Executive Director and Executive Board are always available for help or advice. OAGC may occasionally ask affiliates to help by surveying their members or passing on important information.

The following are a few items about record-keeping:

1. OAGC requires that each affiliate group annually submit the following documents to the Vice President for Affiliates in order to maintain affiliate status:

- Affiliate Bylaws
- Affiliate Information Form
- Financial Statement
- Proof of 990 or e-990 filing
- Proof of updated registration with the Ohio Attorney General's office
- Updated listing on the OAGC website

OAGC will send out letters requesting these updates annually, usually by April 1.

2. **Sample treasury reports, membership reports, contribution receipts, bylaws, and financial statements are contained in Appendix VI.** Although OAGC does not offer any training literature to affiliates for record keeping, you can request advice from the Vice-President for Affiliates.

3. **Treasurer:** Each affiliate group should have a Treasurer who documents all cash and material donations. Donations and expenses should be recorded 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.
- Contributions and donations of cash and materials may be solicited via direct mail, door-to-door inquiry, etc.
- 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 or OAGC.

### ***Sample Constitution and By-Laws***

It is suggested that affiliates function with a Steering Committee during the first months or year. The Steering Committee selects a chair from among its members. Affiliates should conduct your business and business meetings according to Robert's Rules of Order.

First, draft and adopt a constitution and by-laws. The most important rules are placed in the constitution; those most likely to be changed are placed in the by-laws. The constitution should be more difficult to amend than the by-laws.

**See Appendices I & II for a sample constitution and by-laws.** Currently, many organizations draft only a single document, usually called the by-laws. Since the Ohio Association for Gifted Children functions under both a constitution and by-laws, affiliates should function in a similar manner. The guidelines are merely a sample; adapt them to suit your organization's needs. (The statements in parentheses are explanations and are not part of the documents.)

*These documents are important to hold officers harmless from liability for the organization and to ensure that they abide by laws and regulations applying to nonprofit organizations.*

## ***Other Paperwork FAQs***

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

A-Please e-mail [executivedirector@oagc.com](mailto:executivedirector@oagc.com) for this information.

**Q-Do we need to file any additional forms with the State/Federal/County/City Governments?**

A-Yes, you will need to annual file a 990 or e-990 with the IRS and update your registration with the Ohio Attorney General's office. Information about how to do this will be communicated each year before the filings are due.

**Q-Does our affiliate group hold non-profit 501(c)(3) status with the IRS?**

A-Yes, as an affiliate of OAGC, which is a non-profit 501(c)(3) entity, your group also carries this non-profit designation. As a non-profit group, you are entitled to receive tax-deductible donations and make tax-exempt purchases.

**Q-What is our EIN# for tax-exempt purchases?**

A-An affiliate EIN# may be obtained from the Vice-President for Affiliates.

## IV. ADVOCACY

### ADVOCACY - FOR YOUR CHILD

When faced with the need to speak on behalf of their gifted students, most families quickly find that what is happening with their child is inextricably 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 response type from the school is affected as much by the quality of district leadership as by the quality of teaching and family support, not to mention available resources. Most families of gifted students eventually discover their own child is only one of many who need help.

An educated and informed family makes a better advocate for their children. One of the most important tools for successful advocacy is becoming 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.

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. Another way to demonstrate your support for the school and to win allies in the building is to volunteer in some capacity that will help many children. Families who project a positive image and who respect the efforts of all those involved in education win more allies than those who show up just to complain.

Many online resources offer creative ways 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 who work directly with teachers: meeting jointly with the gifted specialist and the classroom teacher can be a good way to start. (Additionally, developing a friendly relationship with the school secretary is always a good idea.) The following excerpt from Elam's "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, 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: Elam, C. (1996). Advocating for appropriate education for your child. Texas Association for the Gifted and Talented. 16 (3): 8-11. Retrieved September 26<sup>th</sup>, 2022 from: <http://files.eric.ed.gov/fulltext/ED404770.pdf>)

## **ADVOCACY - LOCAL LEVEL**

As stated above, advocacy for your own child often leads you (and your group) to consider your district's educational needs. If you have the time and commitment, join your local family and community group, PTA, PTO, or other group that can foster change. Additionally, attend school board meetings and become knowledgeable about district gifted policies and plans, including Acceleration Policies, service options, and opportunities for advanced coursework (such as AP and College Credit Plus) through district websites about gifted and talented services or via the required gifted and talented brochure available in the district's central office or school building(s). Your gifted coordinator or director of gifted education at your district or local ESC can help you discover more about currently available services and can help you brainstorm additional ways to meet gifted students' needs within the district.

Next, build relationships with district and community decision-makers: communicate with them frequently. By doing so, you will become the "go to" person on gifted educational issues. Personal relationships also help you discern the district's and decision makers' most pressing (and personally concerning) issues (also known as "hot-button" issues). Some of your most significant decision makers comprise your local School Board. Establish a meeting to introduce your group to the Board so that they become aware of your group and know your information is up-to-date. Additionally, If your district has a policy committee, a task force, 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 gifted gets a seat at the table! In this way, objections, concerns, or criticisms about the state of gifted education within the district, the building, or the classroom are sure to be addressed.

Family 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 family groups have facilitated change in district and regional policy. A tremendous satisfaction comes from knowing you have made a difference in the lives of many children.

## **ADVOCACY - REGIONAL LEVEL**

As you become more knowledgeable about district services, you realize the strong impact of regional issues, especially in rural areas. For example: regional Educational Service Centers offer gifted education trainings for teachers, while gifted coordinators or directors of gifted education host regional meetings to share about current issues in gifted education; offer updates on current state-wide policy and legislation; or share about opportunities for enrichment and professional development. Additionally, gifted identification in the visual and performing arts often occurs via regional events hosted by an ESC or combined/larger districts. By becoming involved at the regional level you can share the knowledge you have gained and learn from others' experiences. Both special education and gifted education have realized the power and promise that spring from regional organization and advocacy.

Below are additional ideas for regional-level advocacy:

- Attend regional OAGC meetings for orientation to OAGC programs and activities and to network with gifted educators.
- Visit the OAGC website to find nearby family groups.
- Attend meetings of other family groups.
- Join the OHIOGIFT and Family Division listservs, where you can ask questions of other families and teachers.
- Develop business partnerships to benefit your district and region.
- Build relationships between coordinators and families by connecting to the coordinator groups.

Maximize regional resources to build capacity for family groups:

- Connect with other family groups.
- Coordinate to bring in a speaker, have larger functions.

- Share strategies.
- Form multi-district groups to grow or strengthen smaller groups.
- Join with PTAs or PTOs. for meetings and to bring in speakers.
- Network with non-public schools - parochial, charter, independent, home school networks.
- Communicate among families, coordinator, and teacher groups to share information.

## **ADVOCACY - STATE LEVEL**

As you become more aware regional-level gifted issues, it becomes clear that the big-picture solutions often emerge from the state level. For this reason, OAGC is involved in educating legislators; sharing information and resources with the Ohio Department of Education; and sponsoring annual conferences where vendors, presenters and gifted educators of all sorts, including families, can learn and grow.

The first, most important step to becoming aware of state issues is to join OAGC. You can join OhioGift and follow OAGC on Facebook (<https://www.facebook.com/OhioAGC>) or Twitter (<https://twitter.com/OAGCGifted>) for advocacy updates and alerts.

OAGC is a state-wide organization. Encourage your group to affiliate with OAGC, for we have strength in numbers!

### **How Affiliate Groups Can Help Educate Legislators.**

One of OAGC's functions is to educate legislators and State Board of Education members to the needs for gifted education.

When an important issue emerges and you realize you need to contact legislators, here are some tips:

- Identify your state and federal representatives and senators as well as State Board of Education members. Then, discern their stances on specific educational issues.
- Designate a member of your affiliate organization to keep abreast of legislative issues relating to education in general and gifted education in particular.
- Inform your members when a letter, phone, or email campaign is necessary. Form a communications committee to facilitate these actions. At least once a year, include in your newsletter a sample letter to a legislator.
- Look for advocacy alerts under the advocacy links on [www.oagc.com](http://www.oagc.com).
- Legislator contact information is available on the OAGC advocacy link at <https://oagc.com/advocacy/policymaker-contacts/>.

**At times, OAGC will send a call to action for a state or national issue. Your response will have a direct effect on the outcome.**

OAGC can provide your group with further legislative information at your request. For more information contact the OAGC Executive Director:

Ann Sheldon  
 OAGC Executive Director  
 (614)337-0386  
 email: [executivedirector@oagc.com](mailto:executivedirector@oagc.com)



## APPENDIX I: SAMPLE CONSTITUTION

These guidelines are merely samples; feel free to adapt in any way to suit your organization's needs. (The statements in parentheses are explanations and are not part of the documents.)

### ARTICLE 1: NAME AND DEFINITION

- Section 1: The name of this organization shall be \_\_\_\_\_.
- Section 2: The gifted child shall be defined as one who shows superior ability in one or more of the following areas:
- 1) superior cognitive ability.
  - 2) specific academic ability.
  - 3) creative thinking ability.
  - 4) visual and/or performing arts ability; dance, drama, art and music.

### ARTICLE 2: PURPOSE

The purpose of the association is to foster an awareness of the needs of gifted children and to promote the utilization of home, school and community resources for their benefit.

### ARTICLE 3: MEMBERSHIP

- Section 1: Membership shall be open to anyone interested in the education and general welfare of gifted children.
- Section 2: There shall be the following classes of membership:
- a. Active: An active member is one who supports all functions of the organization by paying dues, attending meetings, voting and serving on committees, etc.
  - b. Charter: A charter member is someone who is especially recognized for his or her part in initiating the organization. He/she has the same responsibilities and privileges of an active member.  
***(At some future time in your organization's history, you may choose to amend this section to relieve the Charter Members from fiscal obligations.)***
  - c. Honorary: An honorary member is one who is recognized as having reached a level of expertise in the field of gifted children. Honorary members shall be entitled to all privileges of active members, except voting and holding office. They shall not be required to pay dues. The Executive Committee shall present the names of the prospective honorary members at a regular meeting.  
(This category will give credibility to your organization by honoring respected persons who have been advocates for your purpose. This honor should not be given lightly.)

### ARTICLE 4: OFFICERS

- Section 1: The elected officers of this organization shall be President, Vice-President, Secretary and Treasurer, and they shall constitute the Executive Committee.  
(Many times the immediate Past President serves on the Executive Committee in an advisory capacity only.)
- Section 2: A candidate for office shall have been a member for at least one full year. No officer or committee chair shall serve more than two consecutive years in the same board position.
- Section 3: Nominating Committee – The nominating committee shall be composed of a chair and four members. The chair and one member shall be appointed by the Executive Board and three members shall be elected by the general membership. This election will be held at the first general meeting of the fiscal year.
- Section 4: The nominating committee shall meet prior to the March Executive Board meeting to select a single slate of officers. With the approval of the Executive Board, the slate will be presented to the membership in April and will be voted on by the membership at the Annual Meeting in May.

(The slate may be presented to the membership in April either at a general meeting or through the mail/email.)

Section 5: Nominations shall be presented by the Nominating Committee at the Annual Meeting of the Association. Additional nominations may be made from the floor with the consent of the nominees at this meeting, each nomination requiring a second. In the event of additional nominations, all such positions shall be voted on by ballot.

Section 6: The newly elected officers shall be installed at the Annual Meeting and assume their duties at the June Executive Board Meeting. They shall hold office for a period of one year. (The officers will assume their duties at the June Executive Board Meeting, with the exception of the treasurer who will assume duties after the close of the fiscal year and an audit. Whenever there is an overlap of time between the installation and assumption of duties, that time should be used for officers to work together to facilitate an orderly transition.)

Section 7: A vacancy in any office shall be filled by election at the first regular meeting following the vacancy. Nominees for office shall be presented by the Nominating Committee and nominations may also be received from the floor. All nominations shall be acted on at the same meeting.

#### **ARTICLE 5: MEETINGS**

Section 1: There will be a minimum of three meetings during the school year. The meetings will be held on the first Wednesday of the month. A majority of the members present shall constitute a quorum.

Section 2: The May meeting is designated as the Annual Meeting.

Section 3: Special meetings may be called by the President or upon written request of ten members on a week's notice.

#### **ARTICLE 6: PARLIAMENTARY AUTHORITY**

The rules contained in Robert's Rules of Order Revised shall govern the association in all cases to which they are applicable and in which they are not inconsistent with this constitution. ([www.robertsrules.com](http://www.robertsrules.com))

#### **ARTICLE 7: AMENDMENTS**

Section 1: Constitution – the constitution may be amended at the Annual Meeting of the association by a 2/3 vote of members present and voting provided that written notice has been given to all members prior to that meeting.

(The newsletter, monthly publication, or email can be used for this purpose.)

Section 2: By-Laws – the By-Laws may be amended at any regular general meeting by a 2/3 vote of members present and voting provided that written notice has been given to all members prior to that meeting.

#### **ARTICLE 8: DISSOLUTION**

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

(An article of dissolution is a requirement for OAGC affiliation.)

## APPENDIX II: **SAMPLE** BYLAWS

These guidelines are merely a sample that you will need to adapt to suit your organization's needs. (The statements in parentheses are explanations and are not part of the documents.)

### ARTICLE 1: FINANCE AND DUES

- Section 1: The fiscal year of the organization shall be July 1 to June 30. An annual audit shall follow the close of the fiscal year.
- Section 2: Dues shall be determined by the Executive Committee. (This could also be one of the decisions given to the Executive Board.) Membership dues shall be paid by November 1. (You may also include which officer or committee chair will collect the dues.)
- Section 3: The dues shall entitle a member to the privileges of active membership.

### ARTICLE 2: OFFICERS

- Section 1: President – The President shall preside at regular general meetings, Executive Board and/or Executive Committee meetings. He/she shall be an ex-officio member of all committees except Nominating. He/she shall have been a member of the Executive Board for at least one year prior to his election. He/she will represent the association in any activity related to the education or interests of gifted and talented children and may delegate any general member to so represent the association, if the President or Vice-President is unable to attend. The President will call and preside at a minimum of nine meetings.
- Section 2: Vice-President – The Vice-President shall assume the duties of the President in his/her absence and shall serve as Program Chair.
- Section 3: Secretary – The Secretary shall record the minutes of all General meetings of the organization and of its Executive Board and Executive Committee. He/she shall also have the responsibility of all necessary correspondence.  
***(As your organization grows, you may wish to include a corresponding secretary among your officers to relieve the recording secretary of some duties. Suggested responsibilities include: newsletter, duplication of materials, notification of executive meetings, etc.)***
- Section 4: Treasurer – The Treasurer shall receive all monies of the organization and shall pay out funds. He/She shall report in writing, monthly, all financial transactions. In September, he/she shall give notice of dues and at the end of the fiscal year have the books ready for the annual audit. The Treasurer shall arrange for the audit by either three active members of the organization or an auditor.
- Section 5: Parliamentarian – The Parliamentarian shall be appointed by the President with the approval of the Executive Board. He/she shall be required to attend all General Meetings, all meetings of the Executive Board and any special meetings called by the President. The Parliamentarian shall also serve on the Constitution Committee. ***(This person could be called Procedures Chair and as such would be familiar with tradition and actions by the organization.)***

### ARTICLE 3: EXECUTIVE COMMITTEE

The Executive Committee shall be composed of the elected officers. This committee shall meet at the call of the President and take care of special situations that arise between regular meetings. ***(It is often beneficial to include recent past presidents on the Executive Committee to serve as advisors.)***

### ARTICLE 4: EXECUTIVE BOARD

- Section 1: The Executive Board shall be composed of the Executive Committee, all Standing Committee Chairmen and the Nominating Committee Chair. The Board shall hold regular monthly meetings and a majority shall constitute a quorum. The board shall transact all necessary business between regular meetings of the organization. Special meetings may be called by the President or upon written request of three members on a week's notice.

Section 2: Executive Board members must attend all Board and General meetings unless excused by the President. (Attendance by committee chairs and officers at all meetings is vital to the organization.)

## ARTICLE 5: COMMITTEES

Section 1: Appointments – The President shall appoint the chairs of the Standing and Special Committees with the approval of the Executive Committee. (Standing Committees are those that function every year.)

Section 2: Standing Committees – Each committee shall have one vote on the Executive Board.

- a. Annual Meeting
- b. Publicity
- c. Newsletter
- d. Membership
- e. Ways and Means
- f. Hospitality
- g. Constitution and By-Laws
- h. Legislative
- i. Technology

***(In small groups, it would be acceptable to have elected officers assume the duties of these committee chairs. Suggestions for other possible committees include: scholarship, enrichment activities for gifted children, telephone, community outreach, etc.)***

Section 3: Duties of Committee Chairs

- a. The chair shall appoint a co-chair if necessary
- b. The chair shall fulfill the duties as stated in the committee descriptions.  
***(Write descriptions of each committee detailing how it will function and what it is expected to accomplish.)***
- c. The chair shall submit an annual report in writing in duplicate at the Executive Board meeting prior to the annual meeting. One copy is to be filed with the chair who shall succeed him/her and the other to the President.
- d. The chair of the standing committees shall present general plans of work to the Executive Board for approval. No action shall be taken until the general plans are approved. Upon approval of such plans, the committee shall execute other instructions that may be given it by the Executive Board.

## APPENDIX III: GETTING THE MESSAGE OUT

### TIPS FOR NEWS RELEASES

You will have more success if you keep some simple principles in mind (see sample on p.23):

- 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’s 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.

#### 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
- Fundraising Events
- Award Ceremonies

#### WHAT TO INCLUDE:

- All the facts (“5 W’s & H”)
  - Who
  - What
  - Where
  - When
  - Why
  - How
- Participant Quotes, Pictures (assume these won’t be returned)
- Contact name for more details
- Personal Note

#### 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

#### COMMON NEWS RELEASE PROBLEMS

- Not enough information
- Incomplete information
- No contact information
- No follow-up call
- No media notification

#### TIPS FOR SUCCESSFUL RELEASES:

- Be timely and newsworthy
- Contact in advance of event: one-page, official titles, number of participants
- Get to know your “media contacts”
- Include a personal note
- Get students involved
- Tell TV about action possibilities: Include the time of peak action
- Don’t assume anything
- Send thank-you notes with a token of appreciation (pencil, pen, magnet) after event
- Invite a media personality

#### 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 NEWS RELEASE**

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 over X,XXX gifted students served in the Westerville Schools?"

For more information: President xxxx xxxxxx @ 599-xxxx, xxx@xxx.xxx  
ORGANIZATION NAME & ADDRESS

## APPENDIX IV: OAGC AFFILIATE FAQ'S

**Q - Is our group's affiliate status current?**

A - Please e-mail the OAGC Executive Director at [executivedirector@oagc.com](mailto:executivedirector@oagc.com) for this information.

**Q - What forms are required to maintain affiliate status with OAGC?**

A - OAGC requires that the following documents be submitted:

- Affiliate Bylaws (if updated each year)
- Affiliate Information Form
- Financial Statement

**Q-Do we need to file any additional forms with the State/Federal/County/City Governments?**

A-Yes, you will need to annual file a 990 or e-990 with the IRS and update your registration with the Ohio Attorney General's office. Information about how to do this will be communicated each year before the filings are due.

**Q-Does our affiliate group hold non-profit 501(c)(3) status with the IRS?**

A-Yes, as an affiliate of OAGC, which is a non-profit 501(c)(3) entity, your group also carries this non-profit designation. As a non-profit group, you are entitled to receive tax-deductible donations and make tax-exempt purchases.

**Q-What is our EIN# for tax-exempt purchases?**

A- OAGC does not provide their EIN for tax-exempt purchases. An affiliate Group Exemption Number (GEN) letter will be provided each year once affiliate status is reconfirmed.

**Q - Does our affiliate group hold non-profit 501(c)(3) status with the IRS?**

A - Yes, as an affiliate of OAGC, which is a non-profit 501(c)(3) entity, your group also carries this non-profit designation. As a non-profit group, you are entitled to receive tax-deductible donations and make tax-exempt purchases.

**Q - What is our EIN# for tax-exempt purchases?**

A - Affiliate EIN# may be obtained by following the instructions for completing IRS Form-44 at [www.irs.org](http://www.irs.org). See Appendix IV. The OAGC group exemption number letter will be provided each year.

**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 attached sample Treasury Report, Appendix VI.

**Q - Does our affiliate group need to issue receipts for cash donations?**

A - Although receipts for cash donations are not required, 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.

**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.

**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 OAGC.

**Q - Does OAGC offer any training literature to affiliates for record keeping, etc.?**

A - OAGC offers samples of a treasury report, membership report, contribution receipt, and financial statement in Appendix VI. Appendices I & II contain a sample affiliate constitution and bylaws. These issues will be reviewed during the annual Affiliate Group Orientation.

**Q - Can affiliates reprint articles from the Review and OAGC website in affiliate newsletters and publications?**

A - Advocacy Corner from the Review and most articles from the OAGC website may be reprinted in affiliate newsletters and publications without specific permission if credit is given. Please check with each author of specific articles for permission and credit requirements to avoid violating copyright laws.



**APPENDIX V. SAMPLE FORMS**

**SAMPLE TREASURY REPORT**

**Affiliate Name**  
**Date of Treasurer's Report**  
**Name of Treasurer**

**Beginning Balance.....\$ 950.61**

Deposits.....+ \$67.00

2004/5 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**

## **SAMPLE MEMBERSHIP REPORT**

**Affiliate Name**  
**June 7, 2004 Membership Report**  
**Name of Corresponding Secretary**

**2003/2004 Paid Members as of April 5, 2004..... 29**

Professional UnPaid\*\* Members Added – District Gifted Coordinator  
School Building Principals  
District Superintendent  
School Board Members  
Regional Government Officials

**2003/2004 Paid Members as of June 7, 2004..... 32**

**2003/2004 Total Members as of June 7, 2004..... 37**

\*\*At April business meeting, Affiliate voted to add Unpaid (Non-voting) Professional Members (such as Gifted and Talented staff, the Superintendent, and other school personnel).

**SAMPLE RECEIPT**

**Receipt for Monetary or Material Donation**

Date \_\_\_\_\_

Affiliate Name \_\_\_\_\_

Received of \_\_\_\_\_

Amount/Detail \_\_\_\_\_

\_\_\_\_\_  
Affiliate Officer's Signature and Title

## SAMPLE FINANCIAL STATEMENT

**Affiliate Name**  
**2003/2004 Financial Report**  
**Name of Treasurer**

**Beginning Balance as of November 14, 2003.....\$ 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 March 5, 2004.....\$ 649.46**

Projected Deposits through June 30, 2004..... + \$30.00

Membership/donations.....\$ 30.00

Projected Expenditures through June 30, 2004..... - \$210.02

Super Saturday reminder cards.....\$ 187.50

Newsletter printing..... 22.52

**Projected Ending Balance as of June 30, 2004.....\$ 439.44**



# AFFILIATE INFORMATION

## GROUP INFORMATION

Name of Organization: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Employer Identification Number (EIN): \_\_\_\_\_

## OFFICERS

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 #: \_\_\_\_\_



# AFFILIATE INFORMATION

## MEMBERS OF YOUR ORGANIZATION

Please list three (3) members. Professional affiliate (e.g., regional coordinator affiliates) organizations must list three (3) members who are also OAGC members.

Name: \_\_\_\_\_ School District: \_\_\_\_\_

Name: \_\_\_\_\_ School District: \_\_\_\_\_

Name: \_\_\_\_\_ School District: \_\_\_\_\_

## AFFILIATE MEMBERSHIP INFORMATION

Number of members: \_\_\_\_\_ Annual Dues: \_\_\_\_\_

Amount of Current Assets: \_\_\_\_\_ Current Net Income: \_\_\_\_\_

\*Filed the IRS- e990 for this year (yes or no) \_\_\_\_\_ Submitted OAGC website info (yes or no) \_\_\_\_\_

\*Registered with the Ohio Attorney General's Charitable Organization? (yes or no) \_\_\_\_\_

Affiliate tax year? (eg. Jan 1 – Dec 31 or Sept. 1 – Aug 31) \_\_\_\_\_

\*All affiliates must file with the IRS AND register with the Ohio Attorney General's Office

***Our organization, \_\_\_\_\_ requests affiliation with the Ohio Association for Gifted Children. We certify that three members are also members of OAGC.\* If they were updated during the year, we have submitted a copy of our constitution/bylaws (including an appropriate dissolution clause), a financial statement, and this affiliation form to the OAGC Vice President for Affiliate Relations, in accordance with the policy outlined by OAGC. We authorize OAGC to include us in their application for a group tax exemption letter.***

***Authorized Representative (print name): \_\_\_\_\_***

***Signature: \_\_\_\_\_ Position: \_\_\_\_\_***

***Date: \_\_\_\_\_***

Please make a copy of this form for your files, attach a copy of your ratified constitution/bylaws, financial statement, and list of activities and return to:

OAGC

P.O. Box 30801; Gahanna, OH 43230

Fax: 614-337-9286 email: [executivedirector@oagc.com](mailto:executivedirector@oagc.com)

\*Required only for professional affiliate groups such as regional coordinator affiliates.



# AFFILIATE INFORMATION

## APPENDIX VIII. SEED MONEY REQUEST FORM

### GROUP INFORMATION

Name of Organization: \_\_\_\_\_ Date: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Employer Identification Number (EIN): \_\_\_\_\_

School District: \_\_\_\_\_ County: \_\_\_\_\_ Region #: \_\_\_\_\_

### REQUEST (USE ADDITIONAL SHEETS OF PAPER IF NECESSARY)

Need: \_\_\_\_\_

Strategy to meet this need: \_\_\_\_\_

\_\_\_\_\_

People involved: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Budget: \_\_\_\_\_

\_\_\_\_\_

Dates of project: \_\_\_\_\_

Report: (one paragraph report due back to OAGC when the money is spent)

Please delineate the strengths and weaknesses of your project, so other groups may learn from your experience.

Please submit this form by October 31 of the academic year in which the funds will be used to:

OAGC

PO Box 30801

Gahanna, OH 43230

Questions? call the OAGC office at 614-337-0386