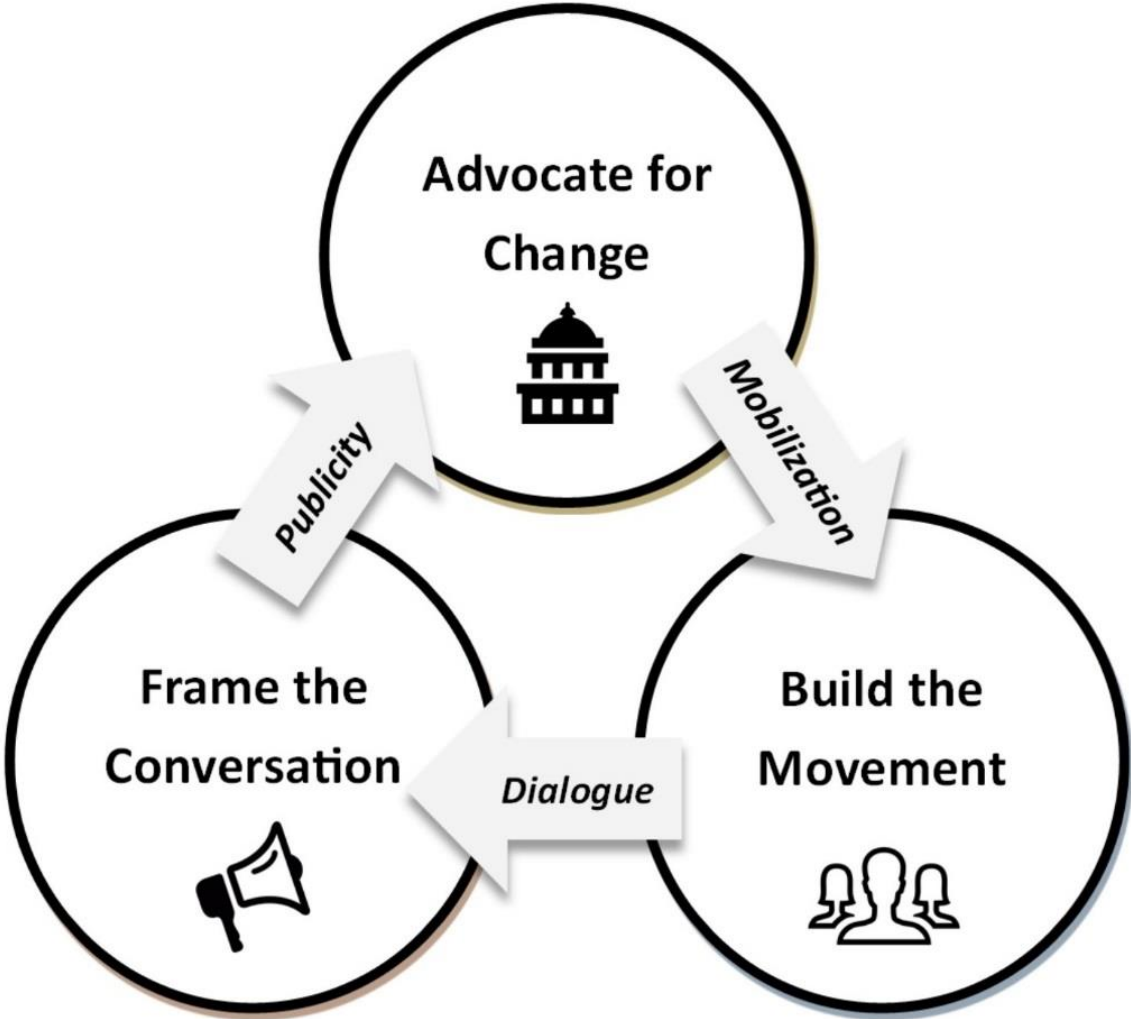


Building Advocacy & Lobbying Capacity

Advocacy in Action: Cultivating Champions for a Collective Voice

Advocacy can be a powerful catalyst for change to improve the laws, policies, structures, and beliefs that impact entire communities. Despite the real impact advocacy can have on increasing economic security, less than one-third of service organizations engage in advocacy to promote their missions (Bolder Advocacy, 2016).

Our respective missions will never be fulfilled if we accept policy decisions that are made without us. When we are at the table with policymakers, we can ensure that our priorities are heard, that our communities are represented, that good ideas are funded, and that failing policies are questioned. By **(1) advocating for change, (2) building the movement, and (3) framing the conversation**, nonprofit organizations can help set the stage for real and lasting success for the people and issues we serve.



Tips for Talking with Elected Officials

- 1. YOU can make a difference and be an agent of change.**
 - Advocacy isn't just for high-paid industry representatives – it's something anyone can do.
- 2. Elected officials want to hear from you.**
 - Elected officials depend on their constituents to help inform them on the issues and to help guide their decisions.
- 3. There are a variety of opportunities and ways to communicate with your officials.**
 - You can email, send a letter, phone call, personal visit, attend town hall meetings, attend council/commission sessions, and participate in public forums.
- 4. “What” you want to communicate is as important as “how” you communicate.**
 - Think about the best way to tell your story, to share your information, and to ask for the support of your elected official in as clear a way possible. Use values-based messaging.
- 5. Establish short-term and long-term goals.**
 - Make realistic objectives and applaud yourself for each step forward.
- 6. You are unlikely to agree on every issue.**
 - Even if you disagree with your elected official, you can still work effectively by being respectful and building a positive relationship.
- 7. You aren't expected to know everything.**
 - You deliver a powerful message simply by walking through the doors or picking up a pen. It is okay to say, “I don't know the answer, but I'll get back to you.” Leave policy expertise up to the professionals, and be an expert on your story and your passion.
- 8. Always say “thank you.”**
 - Thank elected officials for their time and express appreciation for their work. Their job is hard, and they don't often receive appreciation.
- 9. If you visited in person, don't forget to send a follow-up note.**
 - Provide a short summary of your talk in a follow-up note and include any additional information the elected official requested.
- 10. Become as involved and informed as possible!**



Conveying Values-Based Messaging with Elected Officials

Values-Based Messaging TIPS:

1. Be Aspirational
 - Hope and optimism are more motivating than cynicism. If we suggest that this will be an uphill battle or unlikely to happen, we give elected officials permission to ignore the issue.
2. Values First
 - We feel first and think second. Values are our moral compass.
3. Elevate Our Public Systems
 - We can't give the government or public systems a black-eye, while calling on our government to invest in safety net programs and protect our health and well-being.
4. Focus on 'We'
 - Messages of interdependence are more relatable and guide us toward a community solution. Focus on the 'our,' the 'we,' and foster a sense of connection. This is about all of us and our communities, not just a small group.
5. Choose stories wisely
 - Your story is one of the greatest tools you have to let others know why an issue is important and how it connects to peoples' lives. Select stories that are relevant and emphasize community, not just individuals.

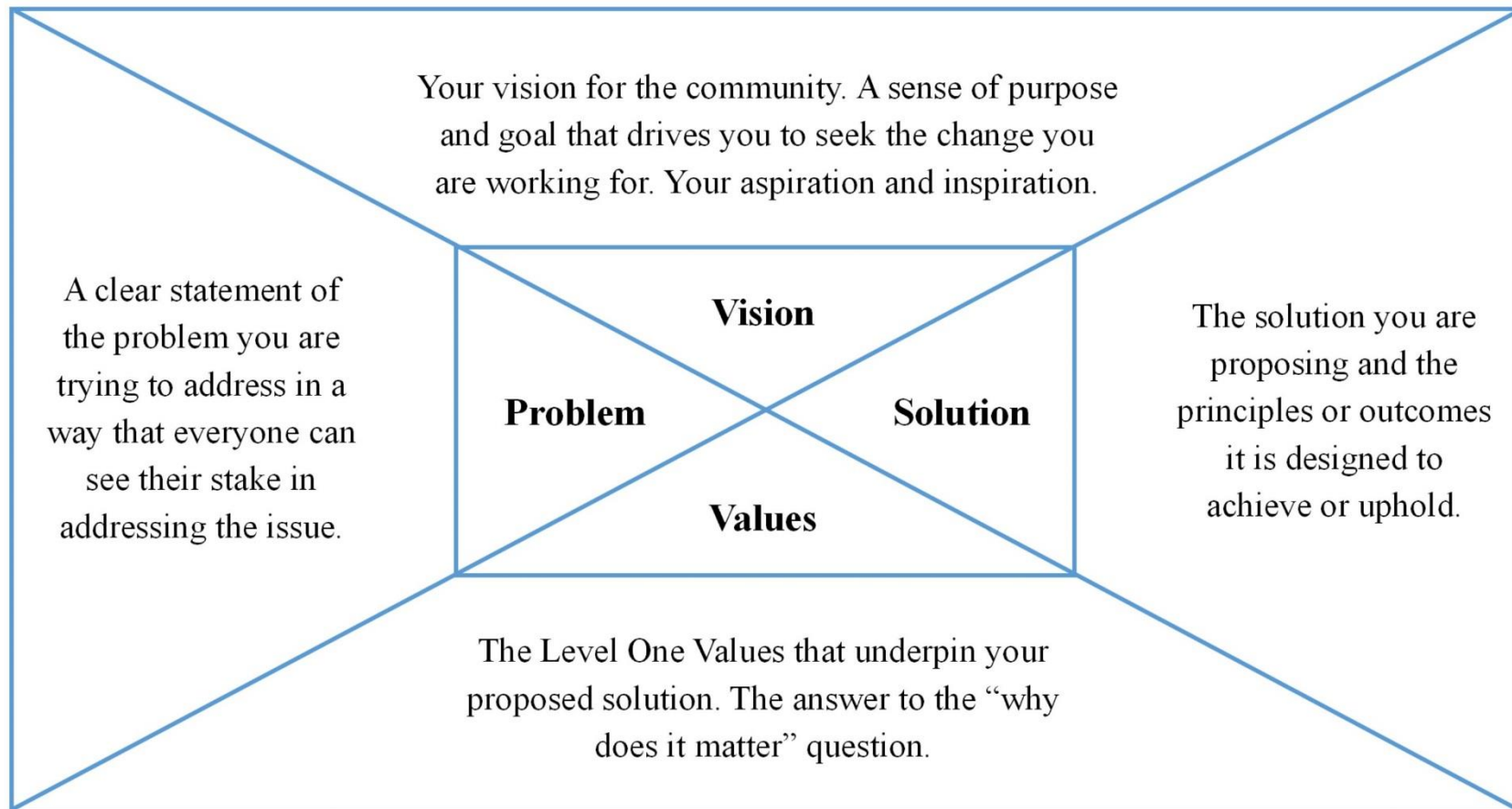
Values-Based Messaging TRAPS:

1. Don't repeat unhelpful stereotypes
 - Avoid repeating generalizations, assumptions, and stereotypes to make a point. Even if you are trying to debunk a stereotype, repeating one normalizes the stereotype and perpetuates a divide. Be sensitive when choosing words you use.
2. Don't step into the other side's 'frame'
 - Keep away from frames that could damage your argument. Stay on message and stick to your rehearsed talking points.
3. Don't use language that 'otherizes'
 - We don't want to stigmatize a group of individuals, especially when we want to create a feeling of interdependence and community well-being. Talking about 'families working hard to gain financial security' (a term we call relate to), rather than 'the poor.'
4. Use statistics sparingly and don't use jargon
 - One simple statistic or number per paragraph is probably a maximum. No decimal points are ever necessary. Remember, stories illustrate our values better than statistics.



Keeping Our Message Big Enough: Creating a Message Box

It is easy to get bogged down in the details of policy debates and to be pulled into defensive positions when trying to articulate your positions or proposals. One of our central challenges is to keep our communications focused on our vision and values—a story big enough for people to see what is possible in their community and why. There will be plenty of time and opportunities to fill in details and deal with the intricacies. Our communications needs to set the big picture first. Using a message box can help you do that.



Source: *Public Works*, 2013: www.publicworks.org.



Understanding Nonprofit Lobbying and the Law

Public Charities CAN Lobby

Much advocacy work, including efforts to influence executive branch actions, does not constitute lobbying. Yet contrary to popular misconception, 501(c)(3) public charities—including houses of worship and public foundations—can lobby. In fact, the Internal Revenue Service has stated that public charities “may lobby freely” so long as lobbying is within generous specified limits.

Federal tax law controls how much lobbying 501(c)(3) organizations can engage in. Public charities can choose to measure their lobbying under either the insubstantial part test or the 501(h) expenditure test. While lobbying is not defined under the insubstantial part test, this fact sheet provides an overview of how lobbying is defined for organizations that measure their lobbying under the 501(h) expenditure test.

Understanding Types of Lobbying

In order for an action to be considered direct lobbying or grassroots lobbying it must contain all of the below elements. If one or more of the required elements is missing, understanding the meaning of each element is key.

<p><i>Direct Lobbying:</i></p> <p>Communication with a legislator that expresses a view about specific legislation.</p>	<p><i>Grassroots Lobbying:</i></p> <p>Communication with the public that expresses a view about specific legislation and includes a call to action.</p>
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- **Communication:** A conversation (in person or by phone), letter, email, fax, or other creative mechanism to convey a message.
- **Legislator:** A member of a legislative body or her staff. In addition, executive branch officials who participate in the formulation of legislation are considered legislators (such as the governor or mayor when vetoing a bill or an agency secretary when helping the legislature write a bill). Members of administrative bodies, however, such as school boards, sewer and water districts, housing authorities, zoning boards, and other special purposes bodies, whether elected or appointed, are not considered legislators.
- **Public:** Anyone but a legislator or member of an organization. Communications to an organization’s members are treated more favorably, so a communication to an organization’s members that urges them to contact legislators to express a view about specific legislation is considered to be direct lobbying. For this purpose, a member is someone who has given more than a small amount of time or money to the organization.
- **Expresses a view about specific legislation:** A bill or resolution that has been introduced in a legislative body or a specific proposal to solve a problem. Specific legislation includes budget appropriations and taxes, and attempts to influence the confirmation of judicial and executive branch nominees. A proposal may qualify as specific legislation even if it has not yet been introduced, been written down, or even fully fleshed out. Specific legislation does not include



rulemakings / promulgation of regulations, executive orders, litigation, or attempts to enforce existing laws.

- **Call to action:** A specific means of encouraging the communication's recipient to take lobbying action. A call to action must comprise one of the following actions: 1) tell the recipient to contact a legislator; 2) provide information on how the recipient can contact his legislator, such as providing the phone number or address; 3) provide a mechanism for enabling the recipient to contact his legislator, such as a postcard, petition, or email form; or 4) identify a legislator who will vote on the legislation as being opposed to or undecided about the organization's view on the legislation, a member of a legislative committee who will vote on the legislation, or the recipient's legislator. Ballot measure activity is considered direct lobbying. Although ballot measures, such as referenda, bond measures, and ballot initiatives, are determined at the voting booth, efforts for or against them are considered direct lobbying, not impermissible electoral activity. Efforts aimed at convincing the public to support or oppose ballot measures are direct lobbying since the voting public serves as the legislature.

Not Lobbying

There are four principal exceptions to these definitions. Any communication that meets one of these exceptions does not count as lobbying:

- Nonpartisan analysis, study or research that presents all sides of an issue. The communication must provide a full and fair exposition of the underlying facts and it must be made available to the general public, a segment of the general public, or to governmental bodies or employees. The document should provide enough information to allow readers to draw their own conclusions about the issue, even if the report itself contains a specific conclusion. For example, an organization might write a paper discussing the need for access to healthcare by low-income children, which might conclude with a recommendation for increased funding for state child health insurance.
- Responses to written requests for assistance from committees or other legislative bodies. The communication must be in response to a written request by a legislative body, committee, or subcommittee (not an individual legislator), and it must be made available to all members of the requesting body. As an example, the executive director of a public charity, in response to a written request from the chair of a legislative committee, could testify in support of a clean indoor air bill, without counting the expenses toward the organization's lobbying limits.
- Challenges to or support for legislative proposals that would change the organization's rights or its right to exist. The communication must be with a legislative body regarding possible actions of that body which could affect the organization's existence, powers, duties, tax-exempt status, or the deductibility of contributions to the organization. For instance, proposed legislation to eliminate the tax-deductibility of contributions to 501(c)(3) organizations would fall within the so-called "self-defense" exception.
- Examinations and discussions of broad social, economic, and similar problems. Communications on general topics which are also the subject of specific legislation must not refer to specific legislation or directly encourage the recipients to take action.

Source: *Bolder Advocacy: "Public Charities CAN Lobby" and "What is Lobbying Under the 501(h) Election?"*



Advocacy Checklists for Success

Steps in Direct Lobbying:

- Identify and learn about the decision makers whom you need to influence and whose support you need to win.
- Establish strong working relationships with key elected officials as early as possible.
- Identify the elected officials who are your champions and work closely with them.
- Present your information to targeted elected officials and their staff.
- Ask decision makers to support your position.
- Respond to decision makers based on their level of agreement with you.

Key Organizing Actions:

- Identify existing supporters.
- Develop a list of potential supporters. These are your “targets.”
- Recruit. Reach out to have conversations with potential supporters. Understand their interests and allow those interests to influence your organizing and advocacy strategies.
- Engage supporters and make them an integral part of your team. Provide information, gather their knowledge and stories, include them in planning and strategy sessions and be responsive in dialogue with them.
- Prepare your base so that people have training in the skills that you are asking them to use and know what they will be asked to do and when.
- Mobilize the base when the time is ripe for their advocacy in activities ranging from emails to meetings to events.
- Debrief and evaluate your collective efforts. Celebrate the accomplishments and rewards of working collectively.
- Reengage for the next tier of action on your issues.

Elements of Media Advocacy:

- Learn about the media available to you, traditional and new media.
- Identify and build working relationships with members of the media who cover your issue area, government and politics.
- Present your organization as a resource to the media on issue in which you have expertise.
- Prepare your key messages and adapt them for many forms of earned media: letters to the editor, opinion editorials, social media, web postings and other available outlets.
- Provide the media with contacts 24/7. Their deadlines may not coordinate with your usual working hours.
- Build and maintain good media lists and communications systems for reaching media.

Source: *The Jossey-Bass Handbook of Nonprofit Leadership and Management, 2010.*



Identifying Policy Issues

Preparing Your Nonprofit for Policy Advocacy by Selecting and Prioritizing Issues

On the table below, list those issues currently in discussion, those anticipated over the next year, and those you wish to initiate. The place a check (✓) if the issue is within your mission, goals, and criteria.

	Serves Mission	Fits Goals	Consistent with Criteria	Priority Ranking
Issues already in discussion				
Issues to Anticipate				
Issues to Initiate				

Source: *The Lobbying and Advocacy Handbook For Nonprofit Organizations*, 2013.



Building Advocacy & Lobbying Capacity

Additional Resources

Bolder Advocacy

- BolderAdvocacy.org
- Free Technical Assistance Hotline: 1-866-NP-LOBBY (1-866-675-6229)
- Bolder Advocacy promotes active engagement in democratic processes and institutions by giving nonprofits and foundations the confidence to advocate effectively and by protecting their right to do so. Our goal is to demystify and decode advocacy by equipping organizations with knowledge and tools. We help organizations fully understand the rules and become assertive in their right to pursue their policy goals.

The Lobbying and Advocacy Handbook for Nonprofit Organizations, Second Edition: Shaping Public Policy at the State and Local Level

- Avner, Marcia (2013). *The Lobbying and Advocacy Handbook for Nonprofit Organizations, Second Edition*. New York: Fieldstone Alliance.
- The Lobbying and Advocacy Handbook for Nonprofit Organizations, Second Edition, is your complete road map to shaping public policy at the state and local level. It gives detailed, step-by-step instructions for developing an effective plan and putting it into action. With this handbook, you will discover how lobbying can help fulfill your mission; learn how to initiate, support, or defeat bills; develop effective lobbying skills; gather and mobilize support for your positions; learn how to use the media effectively; influence gov't administrators to back your policy positions; comply with state and federal regulations; and set up systems in your nonprofit to support lobbying.

Stand for you mission

- Standforyourmission.org
- Initiated by BoardSource — together with the Alliance for Justice, the Champion Foundation, the Forum of Regional Associations of Grantmakers, the John S. and James L. Knight Foundation, and the National Council of Nonprofits — this campaign seeks to unleash the full potential of the nonprofit sector to create positive impact by engaging board leaders more directly in the advocacy work of their organizations.

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