Advocating for Change: How Your Nonprofit Can Impact Policy

February 28, 2018
Welcome

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Housekeeping

- This webinar is being recorded and will be available online within one week
- All webinar attendees are muted to ensure sound quality
- Ask a question any time by typing the question into the text box of the GoToWebinar Control Panel
- If you experience any technical issues, email gotomeeting@prosperitynow.org
Prosperity Now’s mission is to ensure everyone in our country has a clear path to financial stability, wealth and prosperity.
Presenters

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Director, Bolder Advocacy
Alliance for Justice

Vanna Cure
Senior Advocacy Manager
Prosperity Now
Agenda

• Why Advocate Now?
• The Legislative Process: Local Impact of Federal Policy
• Lobbying vs. Advocacy
• Best Practices for Effective Advocacy
• Advocacy Tools
Poll: What's your role within your nonprofit or coalition?

- Advocacy/Policy
- Service Delivery
- Research/ Data
- Organizational Leadership
- Development
- Other Programmatic Focus (tell us more in the chat box!)
Local Impact of Federal Policy

Mandatory grants to state and local governments totaled $467 billion in federal fiscal year 2016.

Federal Grants Fund Critical State and Local Services

Discretionary grants to state and local governments by purpose, fiscal year 2015

- Transportation: 31.6%
- Housing and community development: 22.6%
- Workforce & social services: 15.9%
- Health & environment: 7.3%
- Education: 20.6%
- Public safety: 1.1%
- Other: 0.8%

Note: Discretionary grants are funded annually through the appropriations process.
Source: Office of Management and Budget
Understanding the Federal Legislative Process

- Bill is Introduced
- Committee Markup/Report
- Floor Debate
- Referral to Other Chamber
- Law

Flowchart:
- Co-sponsors/Stories from Field
- Direct Contact to Influence MOCs
- Committee Action/Inaction
- Floor Activity
- Floor Vote
- Conference
- President: Signs or Vetoes

Use Traditional Media to Thank MOC/Describe Negative Impact

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prosperitynow.org
Lobbying vs. Advocacy
Examples

Tax Treatment

Lobbying Activities

Electoral Activities

501(c)(3) Public charity

United Way
American Cancer Society

SIERRA CLUB FOUNDATION

Princeton Area COMMUNITY FOUNDATION

501(c)(3) Private foundation

The Geraldine R. DODGE FOUNDATION

Overdeck Family Foundation

501(c)(4) social welfare

SIERRA CLUB

Cancer Action Network

American Cancer Society

Examples

Tax Treatment

tax-exempt contributions
tax-deductible

tax-exempt contributions tax-deductible

tax-exempt

Lobbying Activities

limited

Prohibitively taxed

unlimited

Electoral Activities

cannot support or oppose a candidate for office

Cannot support or oppose a candidate for office

secondary activity
ADVOCACY is…

✓ A tool to accomplish your mission
✓ Multi-faceted—what’s right for your organization?
✓ Legal
✓ Everyone’s responsibility (even YOU!)
✓ All 501(c)(3)s have a right to advocate
✓ 501(c)(3) public charities have a right to lobby (influence legislation)
✓ 501(c)(3) public charities must comply with generous lobbying limits. Most will benefit from using the “501(h) expenditure test”
✓ Many activities that influence policy will not even meet the definition of “lobbying”
Poll: Which of these activities have you or your organization/coalition done in the past year? Check all that apply.

- Written a letter/email
- Made a call or visited an elected official
- Shared stories about how policy change impacts clients/communities
- Engaged in a social media campaign to educate an elected official on an issue
- Provided testimony in support or against a policy decision
- Other (tell us in the chat box)
Effective Advocacy
I don’t have a lot of time. Can I still be helpful?

You don’t need to make a major commitment of time to effectively engage in advocacy. In fact, the whole point of engaging as a board member, is that your community connections and influence may be really helpful in speeding up advocacy efforts and making them more successful.

Here are some examples of quick ways that board members can make a difference:

- **Get a Phone Call Returned:** If staff have been trying to get a decision-maker to respond, you might be able to call to someone you know (or who knows you) that will ensure that your organization is able to connect with the appropriate person.

- **Encourage Attendance:** If you’re having an educational town hall or other event that would be helpful in educating decision-makers about your organization, your invitation might make a difference in getting them to attend.

- **Get a Meeting:** If you know a decision-maker, or even if you’re simply a voter in his or her community, your participation in a meeting can make a huge difference in whether or not the meeting takes place or how it goes.
AVENUES OF ADVOCACY

- Organizing
- Educating Legislators
- Get to Know Legislators
- Public Education
- Nonpartisan Voter Ed.
- Influencing Corporations
- Lobbying Exceptions
- Regulatory Efforts
- Educational Conferences
- LOBBYING
- Research
- Training
- Litigation

PARTISAN POLITICAL

PROSPERITY NOW

BOLDER ADVOCACY
An initiative of Alliance for Justice
### Types of Advocacy

<table>
<thead>
<tr>
<th>Low Impact</th>
<th>High Impact</th>
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<td><strong>Low Capacity</strong></td>
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**Low Impact**
- Form letters
- Phone calls
- Individual emails/letters
- Telephone town hall comments
- Social Media campaigns

**High Impact**
- Materials drop at Congressional event
- In-person visits
- Letters to the Editor
- Rallies
- Fact sheets (sending directly to staff)
Social Media is Your Friend

#Hashtag your way into the conversation
- Keep up with legislative movements
- Increase visibility for your organization by joining larger conversations

Create a Facebook group for your coalition
- Share upcoming events
- Share responses from elected officials
- Recruit!

Let pictures tell the story
- Instagram can paint a picture that emails can’t—create FOMO!
- Share pictures of rallies and successful community events
Fighting Fatigue

• Stick with a few, key issues areas and set measurable goals
• Try unconventional advocacy tactics or alliances
• Remember that we are in it for the long haul
• Celebrate victories!
• Revisit your “why” frequently
• Ensure that your message/ focus reflects reality of the political landscape
Poll: What advice would you give to a peer new to advocacy?

Type your response into the chat box.
Audience Q & A

What questions do you have?

Share them in the Questions box!
Take action with Prosperity Now Campaigns!

Sign up to stay informed about the latest developments and opportunities to take action by joining one of our four federal policy campaigns.

**HOMEOWNERSHIP**
Homeownership is key to building wealth. Together, we will advocate for products and policies that provide more affordable homes to more people.

**CONSUMER PROTECTIONS**
Consumer protections create fairer, more transparent financial markets. Together, we will ensure consumers keep the safeguards they deserve.

**SAFETY NET**
Safety net programs help protect vulnerable individuals and families from falling deep into poverty. Together, we will protect programs like SNAP, IDAs and more to help those in need when they need it most.

**TURN IT RIGHT-SIDE UP**
The vast majority of tax incentives go to those at the top, not to those who need it most. Together, we will turn our upside-down tax code right-side up.

Visit any of the Campaigns above at [https://prosperitynow.org/get-involved](https://prosperitynow.org/get-involved) to learn more and join.

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Prosperity Now Advocacy Center
Take action today at https://prosperitynow.org/take-action

Here you can:

- Email a MOC
- Call a MOC
- Tweet at a MOC
- Schedule a Meeting
- Sign a petition
Advocacy Boot Camp: An Online Toolkit for Advocates

Use the Advocacy Toolkit to:

- Understand how and why advocacy matters
- Hone your skills as an advocate
- Download Putting Prosperity Within Reach, a how-to guide for advancing equitable policies

https://prosperitynow.org/advocate/toolkit
For free coaching about laws impacting nonprofit advocacy:

advocacy@afj.org
866.675.6229

For free tools, fact sheets, and publications

www.bolderadvocacy.org
alevine@afj.org
@AFJBeBold  @Alevineafj
BolderAdvocacy
Want to dig deeper?

Sign up for listservs and working groups, volunteer to facilitate peer discussions, serve in a leadership role and more!

- Adult Matched Savings Network
- Financial Coaching Network
- Taxpayer Opportunity Network
- Campaign for Every Kids Future — Children’s Savings Accounts
- Affordable Housing Network
- Racial Wealth Equity Network
- Innovations in Manufactured Housing (I’M HOME) Network

Visit any of the networks above at prosperitynow.org/getinvolved to get started.
let’s be bold.
Thank you!

Please complete our survey!