



Supporting your Advocacy

Building Effective Community
Organizations and Getting Agency
Buy-in for Community Practice

Getting Agency Buy-in for Advocacy

- ✦ You will use many of the same assessment, relationship-building, persuasion, and analysis skills to do this internal work as you will in your macro practice
- ✦ Understand your organization's culture
- ✦ Connect with organizational values
 - Excellence, innovation, social justice, competitiveness, risk-taking, empowerment
- ✦ Build a coalition for change within the organization
- ✦ Craft a plan
 - Where to start, what are your short, medium, and long-range goals?

Questions to Consider

- ✦ Role of Board, your access to the Board
- ✦ Previous agency experiences with advocacy?
 - Know what has been tried, who was involved, the outcome
- ✦ Possible costs/losses—be prepared for this question, and try to ascertain how much back-up you have
- ✦ Role of clients in pressuring the agency to take on advocacy
 - Most authentic and effective if it comes from those you serve, but this can be tricky if you expect significant resistance
- ✦ What are you willing to invest/offer?
- ✦ Landscape—what are other organizations doing?
 - Appeal to sense of broader duty and/or competition

“What’s in it for me,” CEO asks?

- ✚ We will build loyalty among our clients
- ✚ We need to compete—others are out there getting what they can for their constituencies/organizations
- ✚ Models engagement for clients and communities—can make our programming more effective
- ✚ Impacting policies and community power structures=only way to really protect our interests
- ✚ Builds relationships with elected officials (that will help us later)
- ✚ Builds power, visibility, reputation for our organization
- ✚ Enhances workers’ skills and provides career development opportunities

Starting Small— “We can just...”

- ✦ Write letters, call, send emails to elected officials
 - Everybody does this after one staff meeting (5 minutes)
- ✦ Make the connections between “cases” and “causes” with staff, clients, and community
 - Committee to discuss common concerns, or electronic way of tracking systemic problems (meet 4x/year)
- ✦ Watch for news coverage of political or policy issues
 - Commitment to respond with a press release or letter to the editor 2x/year
- ✦ Engage our clients
 - Voter registration at intake, invitations to participate
- ✦ Sign up for legislative alerts from like-minded organizations
 - Join a coalition in the community, designate a staff member to forward pertinent alerts

“And then we can...”

- ✚ Sponsor a Lobby Day for your organization or issue
 - Set up visits for Board members, a group of clients, and some staff
- ✚ Host a public forum with candidates or elected officials
 - Collaborate with other organizations/coalitions
- ✚ Organize a campaign to generate calls to legislators
 - Use your donor files (people enjoy being asked for something besides \$\$!)
- ✚ Publish a regular community newsletter
 - Feature your organization’s achievements as well as key policy/community concerns
- ✚ Testify at committee hearings with clients
- ✚ Work with legislators to draft and move bills
- ✚ Follow up with your clients for GOTV
 - Get students or volunteers to make phone calls 2 weeks before Election Day

“We’re a 501(c)3...isn’t this illegal?”

- ✦ Advocacy that does NOT include a ‘call to action’ (including most community practice) is NOT lobbying and is, therefore, unlimited!
 - Educating community, tracking bills, leadership development, nonpartisan voter registration
- ✦ Nonprofit 501(c)3 organizations *are* allowed to lobby.
 - For “non-electing” organizations, lobbying must be “no substantial part of a charity’s activities.”
 - This includes expenditures, time and energy devoted by staff and volunteers, and success in achieving advocacy goals.
 - The 501(h) election allows nonprofit organizations to lobby with greater clarity and less worry.

“We just have to fill out this one form”

- ✦ By filling out a simple 501(h) form, 501(c)3 organizations can be judged instead by specific dollar limits set on lobbying.
 - Can turn into the IRS at any time; keep a copy for your records
- ✦ These nonprofits have no limits on their free (volunteer) lobbying activities and can spend up to 20% of the first \$500,000 of their annual organization’s budget on lobbying (although no more than 25% of this can be spent on grassroots lobbying).

“Here’s what we can and can’t do”

☀ Safe Activities

- Public education about policy issues (with a ‘call to action’, it counts as lobbying)
- Nonpartisan voter registration drives
- Candidate surveys (with guidance)
- Lobbying within legal limits
- Policy analysis without a “call to action”

☀ Unsafe Activities

- Candidate endorsements
- Campaign contributions
- Candidate pledges
- Partisan GOTV
- Exceeding lobbying limits, or failing to keep track of lobbying activities
- Failing to distinguish between “grassroots” and “direct” lobbying

“But what about...?”

✦ Elections

- 501(c)3s cannot engage in candidate activities.
- Activities that may otherwise be permitted, like criticizing an incumbent’s stance, may be seen as “electioneering” if undertaken during an election cycle.
- Can do nonpartisan VR, GOTV, and voter education

✦ Ballot Work

- Permitted, and counted as “direct” lobbying (subject to limits) (but not politician recall ballot measures).

✦ Electronic Communications

- As with other activities, must judge if content is lobbying and if audience is direct or grassroots and count expense.

“What if we get into trouble?”

✚ Alliance for Justice www.afj.org

– Plain-language legal guides, regional and national trainings

✚ Center for Community Change
www.communitychange.org

✚ Charity Lobbying in the Public Interest
www.clpi.org



Fundraising to Support your Advocacy

☀ Fundraising Events

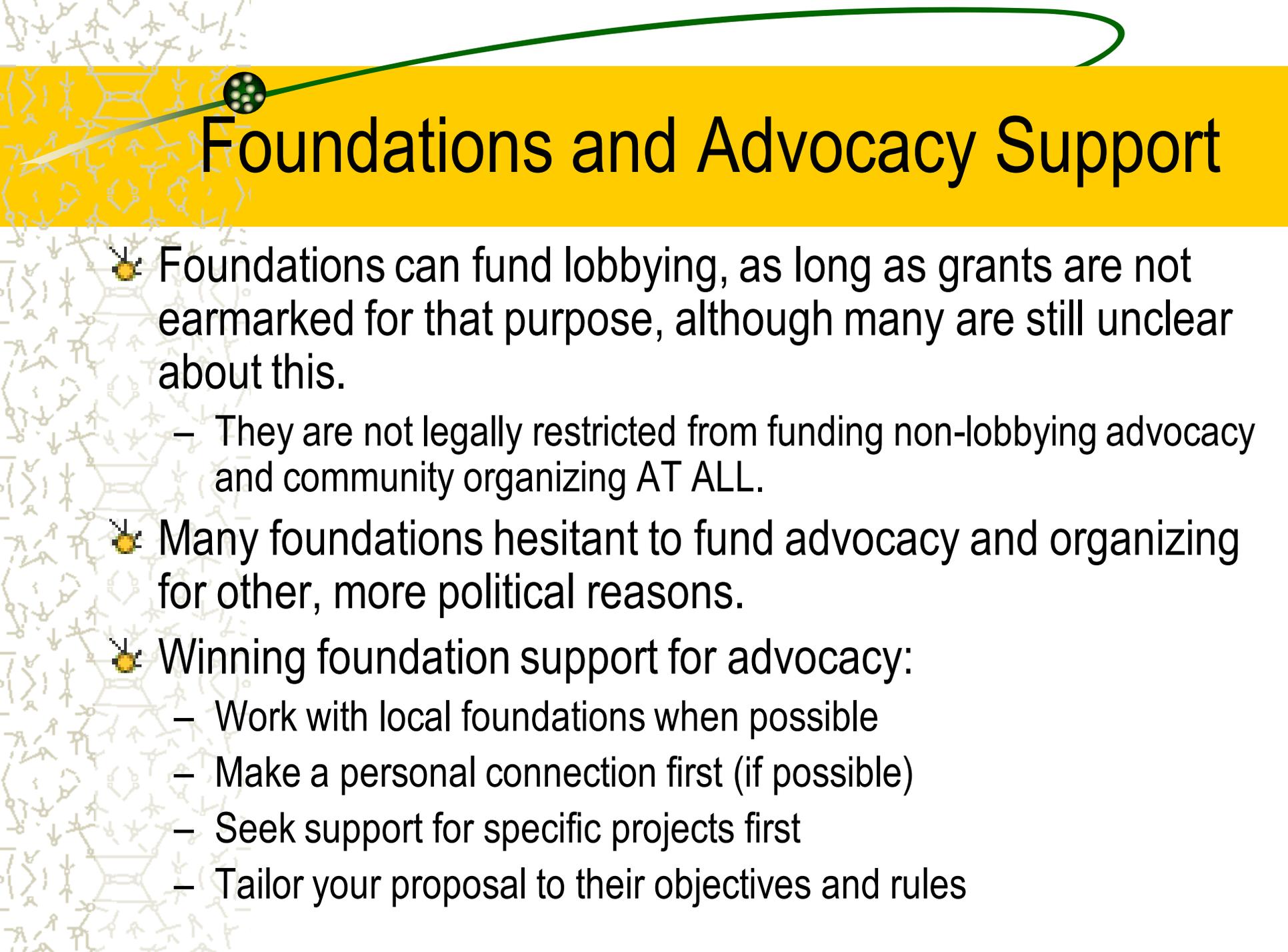
- Must have a *dual purpose* and clear budget, fill a niche
- There are MANY easier and more lucrative ways to raise money, but events can also raise your profile, engage members, educate, and build allies

☀ Membership/Direct Appeals

- Most of our constituents cannot afford high dues, but can structure so that revenue comes in from those affected and also allows sizeable contributions from sympathetic others

☀ Revenue Generation

- Fees for service (policy updates, newsletters, services to other nonprofit organizations)



Foundations and Advocacy Support

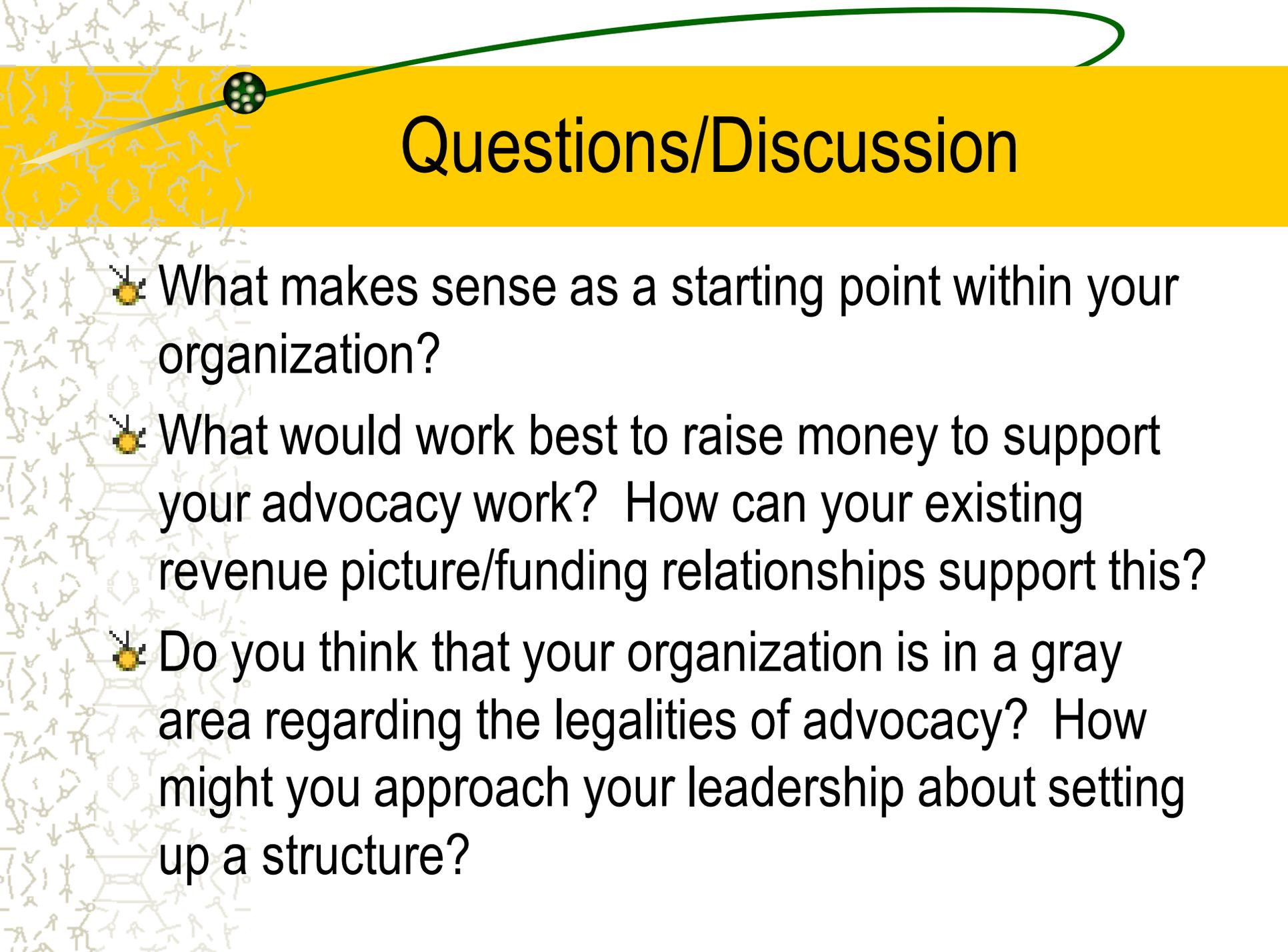
- ✦ Foundations can fund lobbying, as long as grants are not earmarked for that purpose, although many are still unclear about this.
 - They are not legally restricted from funding non-lobbying advocacy and community organizing AT ALL.
- ✦ Many foundations hesitant to fund advocacy and organizing for other, more political reasons.
- ✦ Winning foundation support for advocacy:
 - Work with local foundations when possible
 - Make a personal connection first (if possible)
 - Seek support for specific projects first
 - Tailor your proposal to their objectives and rules

Resources for Foundations and Advocacy

- ✦ Council on Foundations www.cof.org
- ✦ Foundation Center <http://foundationcenter.org>
- ✦ Greater Kansas City Community Foundation
www.gkccf.org
- ✦ National foundations with reputations for leading advocacy funding: Mott Foundation, US Conference of Catholic Bishops CCHD, Nathan Cummings, Atlantic Philanthropies, WK Kellogg, Annie E. Casey, Carnegie, Ford

Starting from Scratch

- ✦ Do I really need my own organization?
- ✦ What kind of organization do I need?
 - For-profit, 501(c)3, 501(c)4, Political Action Committee
- ✦ How do I start?
 - Needs Assessment, Community Engagement (buy-in)
 - Board of Directors/Leadership Development (ownership)
 - Incorporation, structure, by-laws, mission, vision (infrastructure)
 - Programming (action)
 - Fundraising (sustenance)
 - Staffing (maintenance)
 - Staffing can be a dilemma sometimes regarding hiring from the community v. hiring for specific training/skills



Questions/Discussion

- ✦ What makes sense as a starting point within your organization?
- ✦ What would work best to raise money to support your advocacy work? How can your existing revenue picture/funding relationships support this?
- ✦ Do you think that your organization is in a gray area regarding the legalities of advocacy? How might you approach your leadership about setting up a structure?