

# ADVOCACY as a FUNDING Strategy

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philanthropy  
new york

A Regional Association of Grantmakers with Global Impact

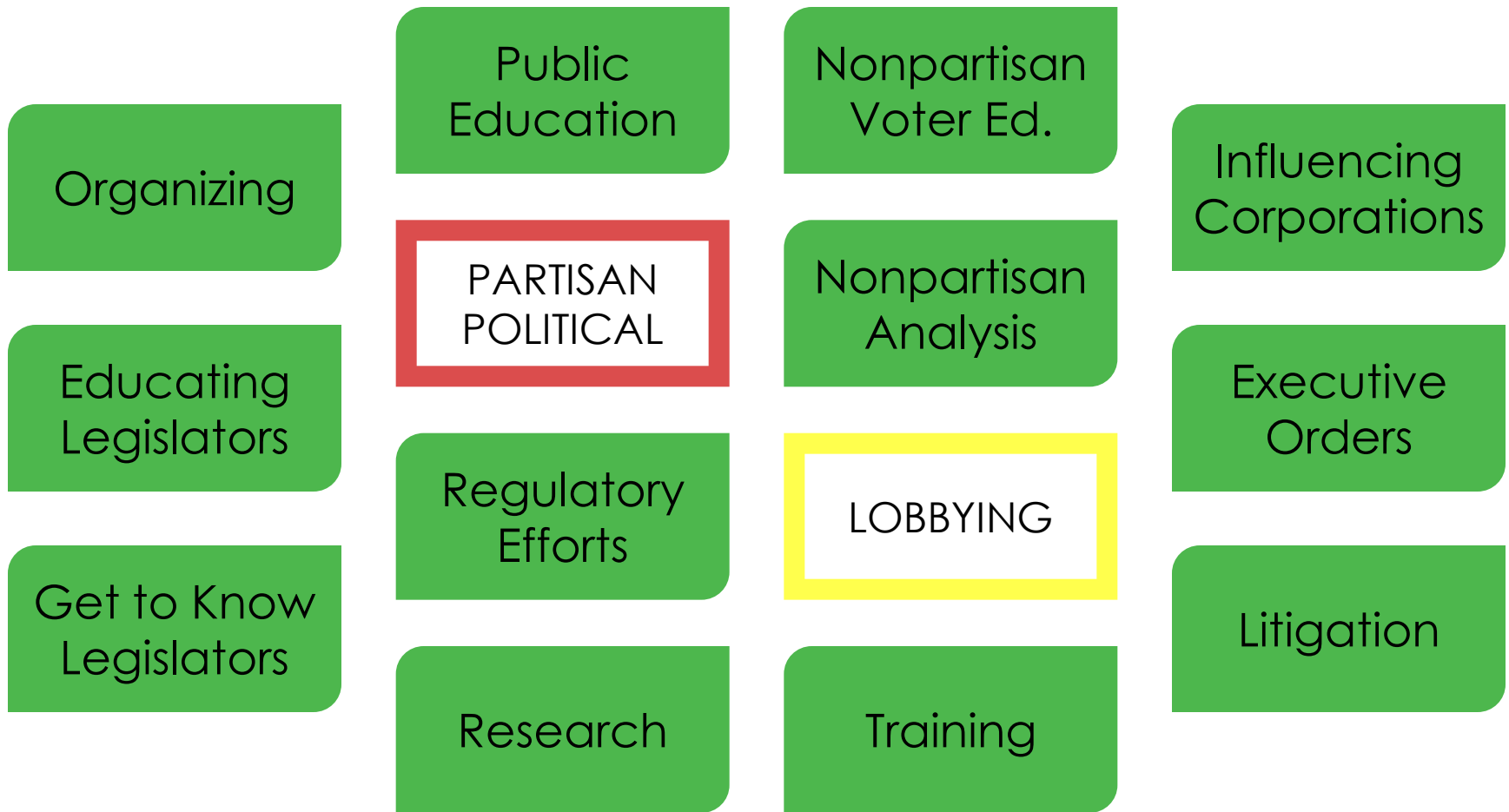
- ✓ Maximize advocacy by 501 (c)(3)s (don't prohibit lobbying; encourage 501 (h) election; encourage advocacy)
- ✓ Importance of 501 (c)(4)s
- ✓ Risk (IRS, state, public perception, lawyers, trustees)
- ✓ Evaluation
- ✓ Safety in numbers (get your colleagues involved)
- ✓ Elements of a successful campaign



Do **YOU**...?

- Allow grant funds to be used for lobbying?
- Provide multi-year funding?
- Provide general operating support?
- Hire staff and recruit board members with policy or advocacy experience?
- Build grantees' advocacy capacity?
- Listen to the needs of grantees and communicate the foundation's support for advocacy?

**Best Practices**



# AVENUES OF ADVOCACY

**501(c)(3)  
Private Foundation**

**501(c)(3)  
Public Foundation/  
Charity**

**501(c)(4)  
501(c)(5)  
501(c)(6)**

**Examples**



THE SCHERMAN FOUNDATION



BROOKLYN  
COMMUNITY  
FOUNDATION



**Tax  
Treatment**

Tax-Exempt  
Contributions  
tax-deductible

Tax-Exempt  
Contributions  
tax-deductible

Tax-Exempt

**Lobbying  
Activities**

**EXTREMELY  
LIMITED**  
Prohibitive tax on  
foundation and  
managers

**LIMITED**  
Insubstantial Part or  
501 (h) Expenditure



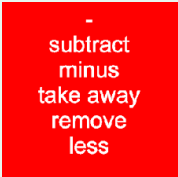
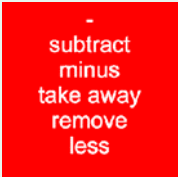
**UNLIMITED**

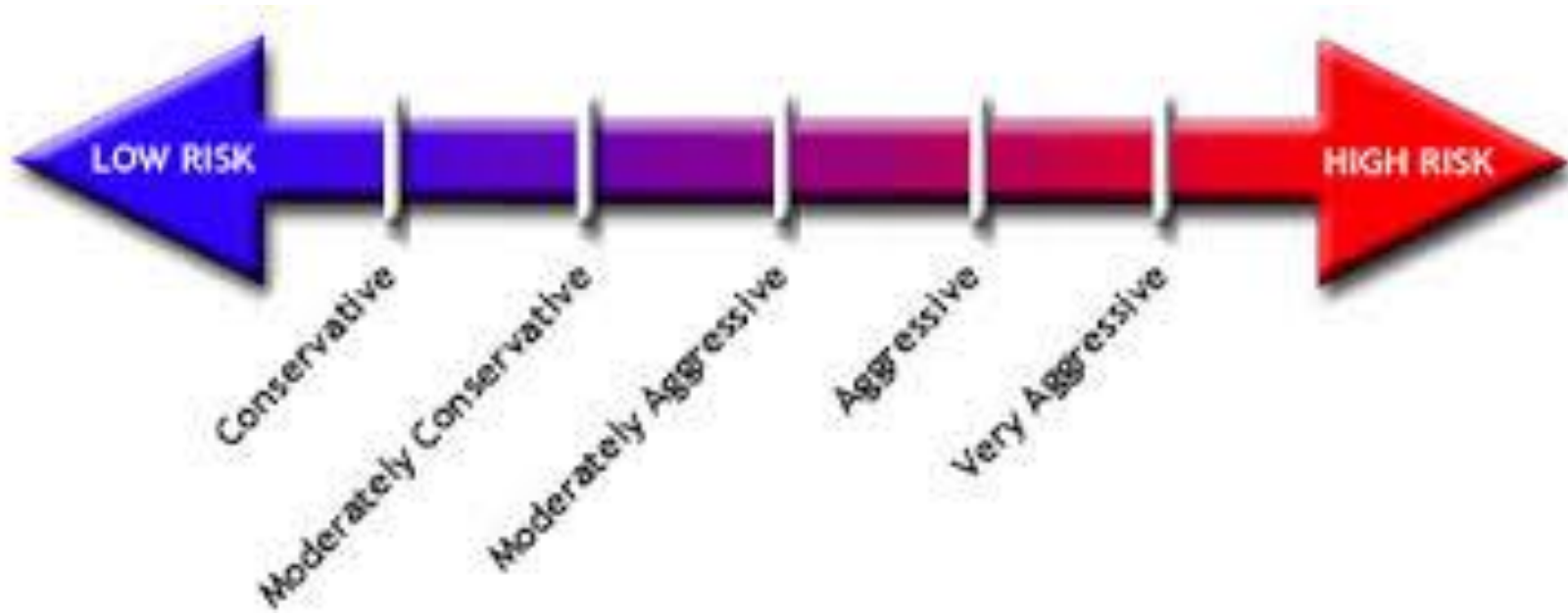
**Electoral  
Activities**

Cannot support or  
oppose a candidate  
for public office

Cannot support or  
oppose a candidate  
for public office

Secondary  
activity  
Must follow  
election law

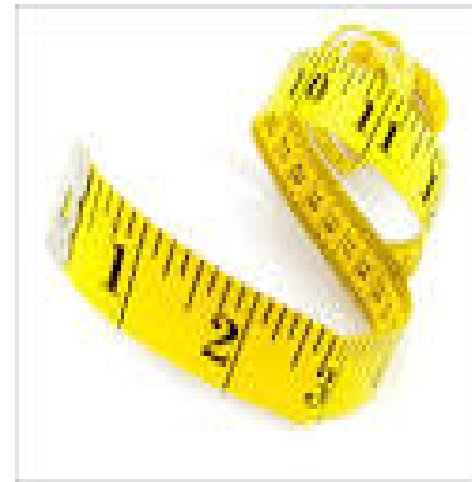
	c3 public charity	c4
Private foundation	<p>Cannot earmark, but <i>may</i> make general support and specific project grants</p> 	<p>Expenditure responsibility grant: must <i>prohibit</i> lobbying with funds</p> 
Public foundation	<p>May earmark grant for lobbying; it counts against foundation's lobbying limit</p> 	<p>Counts against foundation's lobbying limit</p> 



Where do you want to be on the **RISK** spectrum?

# Tips for **EVALUATING** advocacy and community organizing

- ✓ Understand advocacy / community organizing
- ✓ Measure incremental progress and capacity build
- ✓ Value flexibility
- ✓ Combine metrics and stories
- ✓ Value collaboration
- ✓ Set reasonable goals early







## Advocacy Capacity Tool (ACT!)



The most effective advocacy work happens when groups and coalitions know where they stand and can leverage their organizational strengths to work for social change. With the free Advocacy Capacity Tool (ACT!), nonprofits can benchmark their advocacy skills, identify specific gaps and opportunities in their advocacy strategies, and efficiently focus resources to get the best results. The tool can also be used in evaluations.

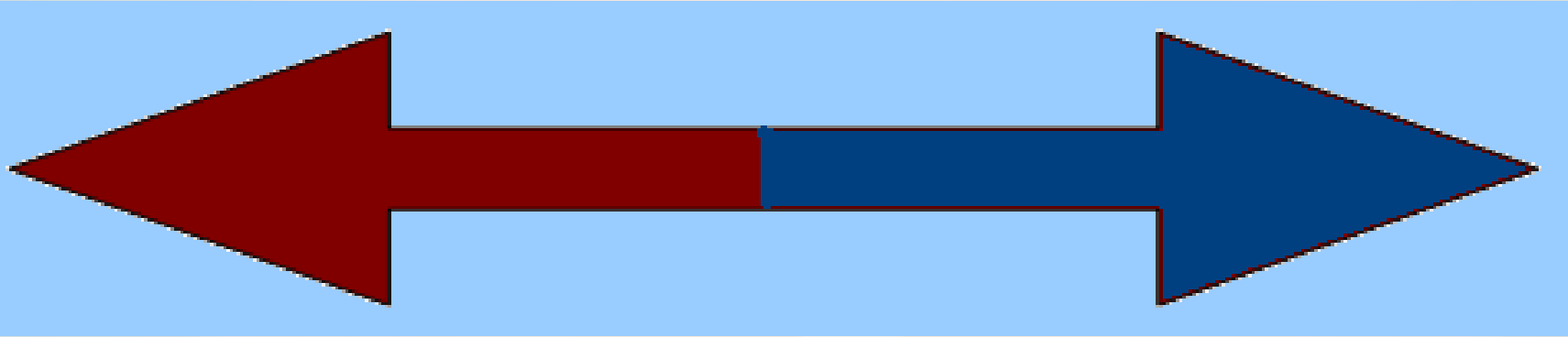


### **NEW: ACT!Quick has arrived!**

[ACT Data & Analysis: The First 280 Advocacy Capacity Tool Users](#) – These findings offer a snapshot of what nonprofit staff and directors say they need to become better advocates, as well as what their current advocacy strengths and gaps are.

[bolderadvocacy.org/act](http://bolderadvocacy.org/act)

# Integrating movement building & advocacy



Mainly  
Policy

Policy,  
Some  
Power

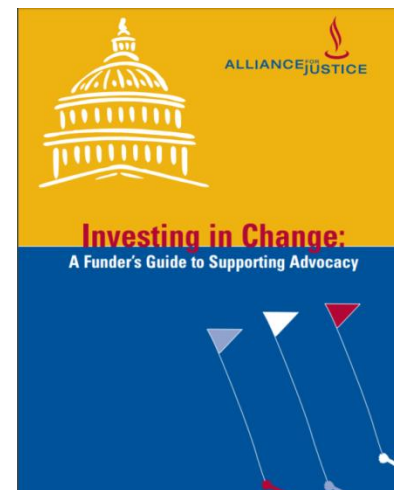
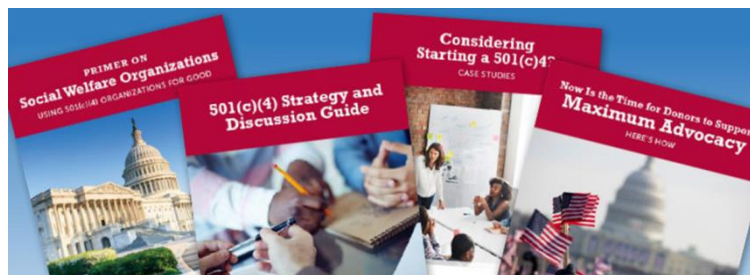
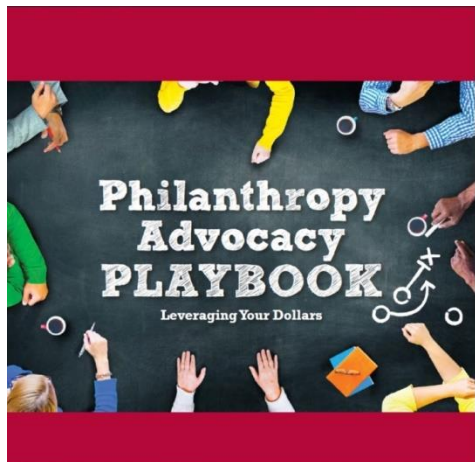
Policy  
& Power

Power,  
Some  
Policy

Mainly  
Power

# Critical **components** of successful ADVOCACY & MOVEMENT BUILDING efforts

- ✓ Research (record, polling, focus groups, allies/opponents)
- ✓ Communications
- ✓ Legislative activity
- ✓ Grassroots / grasstops organizing (coalition building)
- ✓ Electoral



For free coaching about laws impacting nonprofit advocacy:

[advocacy@afj.org](mailto:advocacy@afj.org)

866.675.6229

For free tools, fact sheets, and publications

[www.bolderadvocacy.org](http://www.bolderadvocacy.org)

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