ADVOCACY as a FUNDING Strategy

Nan Aron, President, Alliance for Justice
Abby Levine, Director, Bolder Advocacy
March 31, 2017
✓ 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?
AVENUES OF ADVOCACY

- Organizing
- Educating Legislators
- Get to Know Legislators
- Public Education
- Nonpartisan Voter Ed.
- Influencing Corporations
- PARTISAN POLITICAL
- Nonpartisan Analysis
- Executive Orders
- Regulatory Efforts
- LOBBYING
- Research
- Training
- Litigation
<table>
<thead>
<tr>
<th></th>
<th>501(c)(3) Private Foundation</th>
<th>501(c)(3) Public Foundation/Charity</th>
<th>501(c)(4) 501(c)(5) 501(c)(6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples</td>
<td>The Nathan Cummings Foundation</td>
<td>The Scheram Foundation</td>
<td>Surdna Foundation</td>
</tr>
<tr>
<td>Tax Treatment</td>
<td>Tax-Exempt</td>
<td>Tax-Exempt</td>
<td>Tax-Exempt</td>
</tr>
<tr>
<td></td>
<td>Contributions tax-deductible</td>
<td>Contributions tax-deductible</td>
<td></td>
</tr>
<tr>
<td>Lobbying Activities</td>
<td>EXTREMELY LIMITED</td>
<td>LIMITED</td>
<td>UNLIMITED</td>
</tr>
<tr>
<td></td>
<td>Prohibitive tax on foundation and managers</td>
<td>Insubstantial Part or 501(h) Expenditure</td>
<td></td>
</tr>
<tr>
<td>Electoral Activities</td>
<td>Cannot support or oppose a candidate for public office</td>
<td>Cannot support or oppose a candidate for public office</td>
<td>Secondary activity Must follow election law</td>
</tr>
<tr>
<td>Private foundation</td>
<td>Cannot earmark, but <em>may</em> make general support and specific project grants</td>
<td>Expenditure responsibility grant: must <em>prohibit</em> lobbying with funds</td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Public foundation</td>
<td>May earmark grant for lobbying; it counts against foundation’s lobbying limit</td>
<td>Counts against foundation’s lobbying limit</td>
<td></td>
</tr>
</tbody>
</table>
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
Integrating movement building & advocacy

- Mainly Policy
- Policy, Some Power
- Policy & Power
- Power, Some Policy
- Mainly Power

The diagram illustrates the integration of movement building and advocacy through policy and 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
866.675.6229

For free tools, fact sheets, and publications

www.bolderadvocacy.org
@AFJBeBold
BolderAdvocacy