

# ADVOCACY AND LOBBYING FOR NON-PROFITS



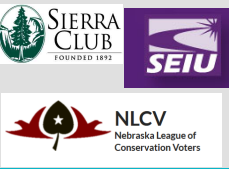
KEELY MONROE



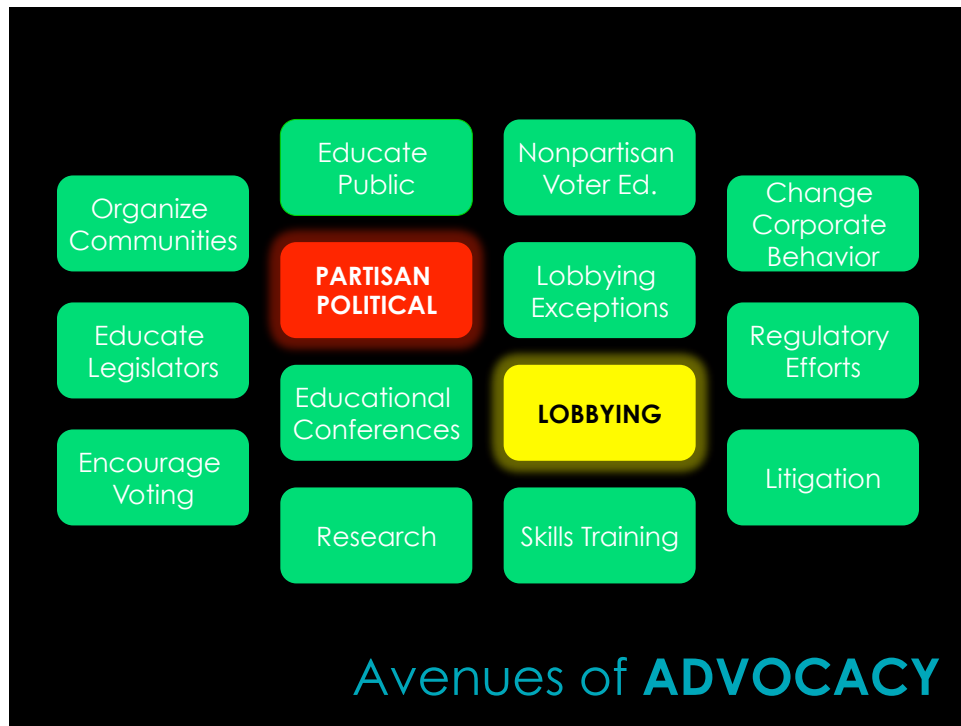
For free coaching about laws impacting nonprofit advocacy:  
[advocacy@afj.org](mailto:advocacy@afj.org) / [keely@afj.org](mailto:keely@afj.org)  
866.675.6229

For free tools, fact sheets, and publications  
[www.bolderadvocacy.org](http://www.bolderadvocacy.org)

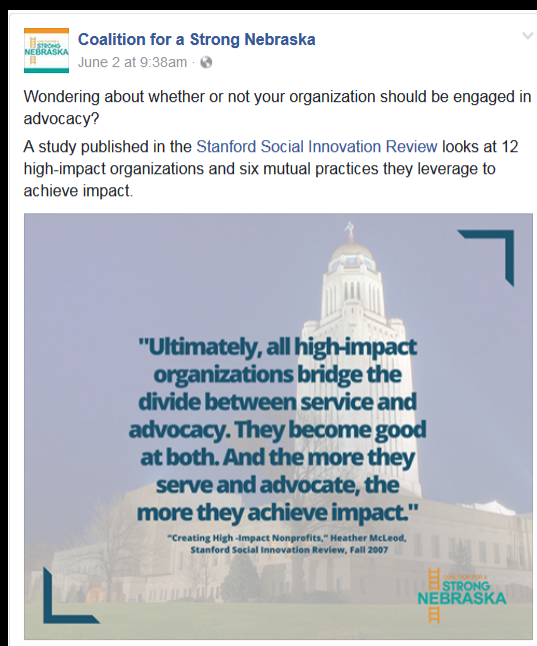
@KeelyAFJ #BeBold

	501(c)(3) Private Foundation	501(c)(3) Public Foundation/ Charity	501(c)(4) 501(c)(5) 501(c)(6)
<b>Examples</b>			
<b>Tax Treatment</b>	Tax-Exempt Contributions tax-deductible	Tax-Exempt Contributions tax-deductible	Tax-Exempt
<b>Lobbying Activities</b>	<b>EXTREMELY LIMITED</b> Tax on foundation and managers	<b>LIMITED</b> Insubstantial Part or 501(h)	<b>UNLIMITED</b>
<b>Electoral Activities</b>	Cannot support or oppose a candidate for office	Cannot support or oppose a candidate for office	Secondary activity Follow federal and state election law

WHAT IS **ADVOCACY?**



WHY **ADVOCACY?**



1. Create systemic change
2. Sustainability for your organization
3. Educate legislators for better policy:  
You are an expert
4. Get to know policy makers so they know to turn to you
5. Empower your constituents and communities
6. **ADVOCACY WORKS!**

Why **ADVOCACY?**



Rules that apply to print and verbal communications also apply to **ONLINE COMMUNICATIONS**



WHEN IS IT **LOBBYING?**

## HOW MUCH **LOBBYING** FOR PUBLIC CHARITIES?

### INSUBSTANTIAL PART TEST

1. What is “insubstantial”?
2. Default test
3. Activities-based
4. Lobbying not defined
5. Penalty



or ...

### 501(h) Expenditure Test

Easy to Opt In -  
Form 5768

Dollar-based Limit

Expenditures Only

Penalties Less  
Severe

Clear Definitions of  
Lobbying

## 501(H) EXPENDITURE TEST!

**501(h) Expenditure  
Test**Easy to Opt In -  
Form 5768

Dollar-based Limit

Expenditures Only

Penalties Less  
SevereClear Definitions of  
Lobbying

**Form 5768** Election/Revocation of Election by an Eligible  
Section 501(c)(3) Organization To Make  
Expenditures To Influence Legislation  
(Under Section 501(h) of the Internal Revenue Code)  
(Rev. September 2016) Department of the Treasury  
Internal Revenue Service **Information about Form 5768 and its instructions is at [www.irs.gov/form5768](http://www.irs.gov/form5768).** For IRS  
Use Only ▶

Name of organization \_\_\_\_\_ Employer identification number \_\_\_\_\_

Number and street (or P.O. box no., if mail is not delivered to street address) \_\_\_\_\_ Room/suite \_\_\_\_\_

City, town or post office, and state \_\_\_\_\_ ZIP + 4 \_\_\_\_\_

**1 Election**— As an eligible organization, we hereby elect to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending \_\_\_\_\_ and all subsequent tax years until revoked. (Month, day, and year)

**Note:** This election must be signed and postmarked within the first taxable year to which it applies.

**2 Revocation**— As an eligible organization, we hereby revoke our election to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending \_\_\_\_\_ and all subsequent tax years (until a new election is made). (Month, day, and year)

**Note:** This revocation must be signed and postmarked before the first day of the tax year to which it applies.

Under penalties of perjury, I declare that I am authorized to make this (check applicable box) ☒ election ☐ revocation on behalf of the above named organization.

\_\_\_\_\_  
(Signature of officer or trustee) \_\_\_\_\_ (Type or print name and title) \_\_\_\_\_ (Date) \_\_\_\_\_

**1. Calculate organization's****Annual Expenditures**  
(for most organizations)**2. Overall lobbying limit**

ANNUAL EXPENDITURES	OVERALL LOBBYING LIMIT
\$500,000 or less	20%
\$500,000 to \$1 million	\$100,000 +15% of excess over \$500,000
\$1 million to \$1.5 million	\$175,000 +10% of excess over \$1 million
\$1.5 million to \$17 million	\$225,000 + 5% of excess over \$1.5 million
Over \$17 million	\$1,000,000

**3. Grassroots lobbying limit is 25% of overall limit**

501(h) Expenditure  
Test

Easy to Opt In -  
Form 5768

Dollar-based Limit

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Severe

Clear Definitions of  
Lobbying

2,409

3,667

Schedule C (Form 990 or 990-EZ) 2010

Page 3

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?			
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c Media advertisements?			\$?
d Mailings to members, legislators, or the public?			\$?
e Publications, or published or broadcast statements?			\$?
f Grants to other organizations for lobbying purposes?			\$?
g Direct contact with legislators, their staffs, government officials, or a legislative body?			\$?
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			\$?
i Other activities? If "Yes," describe in Part IV			\$?
j Total. Add lines 1c through 1i			\$?
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	

501(h) Expenditure  
Test

Easy to Opt In -  
Form 5768

Dollar-based Limit

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Lobbying

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) Total
<b>2a</b> Lobbying nontaxable amount	339,264	356,420	363,219	372,317	1,431,220
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					2,146,830
<b>c</b> Total lobbying expenditures	142,497	58,743	57,967	135,332	394,539
<b>d</b> Grassroots nontaxable amount	84,816	89,105	90,805	93,079	357,805
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					536,708
<b>f</b> Grassroots lobbying expenditures	63,149	24,028	12,776	<b>103,079</b>	<b>203,032</b>

### 501(h) Expenditure Test

Easy to Opt In -  
Form 5768

Dollar-based Limit




Expenditures Only

Penalties Less  
Severe

Clear Definitions of  
Lobbying

# WHAT IS LOBBYING UNDER THE 501(H) ELECTION?

<p><b>DIRECT</b></p> <p>Communication</p> <p>Legislator</p> <p>Expresses a view about specific legislation</p>		
<p><b>GRASSROOTS</b></p> <p>Communication</p> <p>General public</p> <p>Expresses a view about specific legislation</p> <p>Call to action</p>		

<p><b>DIRECT</b></p> <p>Communication</p> <p>Legislator</p> <p>Expresses a view about specific legislation</p>	<p>U.S. Legislators and staff</p>	
<p><b>GRASSROOTS</b></p> <p>Communication</p> <p>General public</p> <p>Expresses a view about specific legislation</p> <p>Call to action</p>	<p>State Legislators and staff</p>	
	<p>County Board of Supervisors, City Council and staff</p>	



**SEARAC** @SEARAC · Jun 29

.@GeneralRoth Please support [#AB1726](#) to ensure ALL our [#AAPI](#) communities are counted! [#AllCounts](#)



**ReproDocs** @reprodocs · Feb 2

Our [@DocLazarin](#) & Dr. Morrell are up in Albany advocating for [#paidleave](#)! We want NY to [#LeadOnLeave](#).



**DIRECT**

Communication

**Legislator**Expresses a view  
about specific  
legislation**GRASSROOTS**

Communication

General public

Expresses a view  
about specific  
legislation

Call to action

President, governor, mayor, or other executive official who participates in the formulation of legislation.



Budget is balanced. Don't use the wrong forecast to justify additional budget cuts.

[@GovRicketts](#) please sign it. [#NELeg](#) [#NEGov](#)



1







**DIRECT**

Communication

Legislator

Expresses a view about specific legislation

**BUDGET OF THE U. S. GOVERNMENT**

**A New Foundation For American Greatness**

Fiscal Year 2018

**A BILL**

To provide for reconciliation pursuant to title II of the concurrent resolution on the budget for fiscal year 2017.

1 *Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,*

2

3 **SECTION 1. SHORT TITLE.**

4 This Act may be cited as the "American Health Care Act of 2017".

5

6 **SEC. 2. TABLE OF CONTENTS.**

7 The table of contents of this Act is as follows:

Sec. 1. Short title.  
Sec. 2. Table of contents.

TITLE I—ENERGY AND COMMERCE

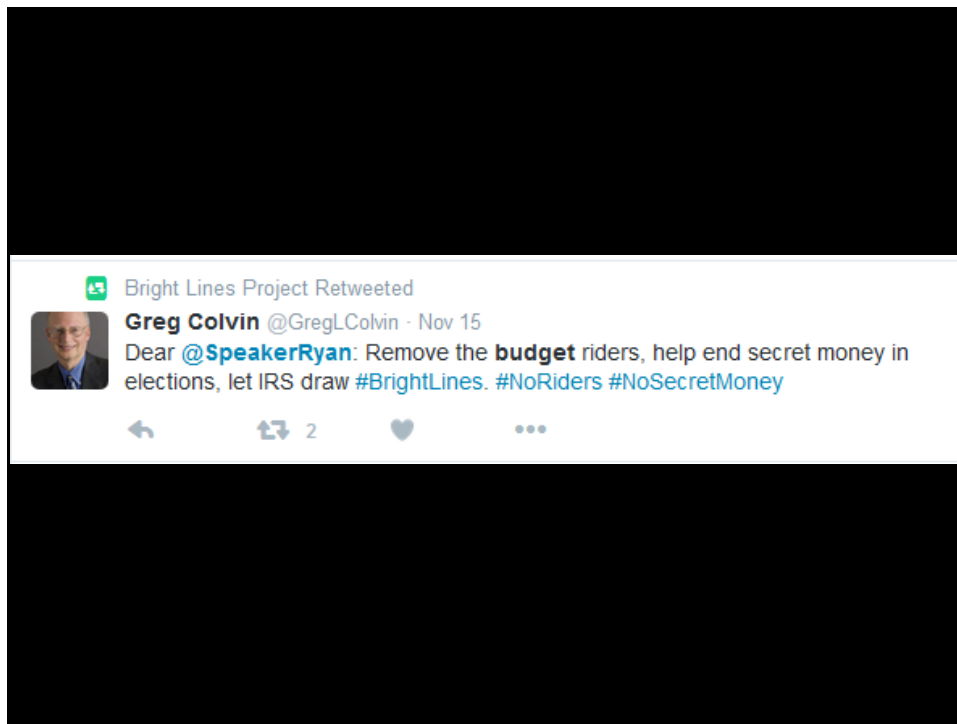
**GRASSROOTS**

Communication

General public

Expresses a view about specific legislation

Call to action



<p><b>DIRECT</b></p> <p>Communication</p> <p>Legislator</p> <p>Expresses a view about specific legislation</p>	
<p><b>GRASSROOTS</b></p> <p>Communication</p> <p>General public</p> <p>Expresses a view about specific legislation</p> <p>Call to action</p>	

KS lawmakers last night rolled back income tax cuts that have caused major damage in the past 5 years. [#NELEG](#)



**Senate overrides Brownback's veto of bill that rolls back his 2012 tax...**

The Kansas Senate on Tuesday night voted to override Gov. Sam Brownback's veto of a bill that rolls back much of the governor's signature...

[kansascity.com](#)



5



1



### DIRECT

communication

### legislator

expresses a view  
about specific  
legislation

### GRASSROOTS

communication

general public

expresses a view  
about specific  
legislation

call to action

## SPECIAL "LEGISLATOR" RULE

Members of the general public are "legislators."

### Ballot Measures

ballot initiatives

referenda

constitutional  
amendments

bond measures



**DIRECT**

Communication

Legislator

Expresses a view about specific legislation

**GRASSROOTS**

Communication

General public

Expresses a view about specific legislation

Call to action

# CALL TO ACTION

**DIRECT**

Communication

Legislator

Expresses a view about specific legislation

**GRASSROOTS**

Communication

General public

Expresses a view about specific legislation

Call to action

**TELLING TO CONTACT**  
legislator(s)

**PROVIDING ADDRESS,**  
telephone number, and/or other  
contact information of legislator(s)

**PROVIDING MECHANISM**  
to enable communication  
with legislator(s)

**IDENTIFYING**  
legislator(s)

**DIRECT**

Communication

Legislator

Expresses a view about specific legislation

**WE NEED A BUDGET THAT SUPPORTS HEALTH CARE. FOR ALL.**



Share
Tweet
Forward this email to a friend!

**We're looking at a downright dangerous federal budget for women, children, and families.**

This week President Trump released the 2018 budget — his vision for the priorities of the US government. There are billions of dollars set aside for things like tax cuts for the wealthy and the infamous border wall with Mexico.

**What Trump's vision does not include:** health care, Medicaid, welfare programs, education, nutrition assistance, disability benefits, the list goes on. **Who is most harmed as a result of Trump's vision:** women, people of color, immigrants, and people struggling to make ends meet.

The new 2018 budget, and the vision it represents, are direct threats to the wellbeing of millions. The time is NOW to ensure that this budget does not receive a vote in Congress.


**Tell Congress to Reject Trump's Budget**

**DIRECT**

Communication

Legislator

Expresses a view about specific legislation



**Nebraska Appleseed** @neappleseed · 14h

Senate could have copy of health care bill to CBO this week! Call our Senators and tell them Nebraskans demand they **#ProtectOurCare**

**Sen. Deb Fischer (202) 224-6551**

Hello, my name is \_\_\_\_\_, and I live at [address] in [CITY]. I'm calling to tell the SENATOR they must improve on the affordability and quality of health coverage, not weaken them like the House's bill.

It would be devastating to pass a bill the CBO says would cause 23 million people to lose their coverage. Older Nebraskans can't afford their premiums to skyrocket. And the AHCA's enormous cuts to Medicaid endangers the health insurance of our most vulnerable people.

Tell your own story about why affordable insurance is important to you

Every Nebraskan needs affordable health coverage. Any health care bill the Senator supports must preserve Medicaid and also make sure to protect coverage for preexisting conditions, prescription drugs, and important women's health care.

Nebraskans need health coverage to be more affordable and have stronger protections. The AHCA is a huge step backwards.

**Sen. Ben Sasse (202) 224-4224**

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**DIRECT**

communication

legislator

expresses a view about specific legislation

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**GRASSROOTS**

communication

general public

expresses a view about specific legislation

call to action

The screenshot shows the National Women's Law Center website. The main heading is 'Urge Your Member of Congress to Support the Pregnant Workers Fairness Act'. Below this is a paragraph explaining the act's purpose. A 'fastAction' button is visible. The form fields include: PREFIX (Optional), FIRST NAME, LAST NAME, STREET ADDRESS, ZIP CODE, CITY, and STATE.

**DIRECT**

Communication

Legislator

Expresses a view about specific legislation

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**GRASSROOTS**

Communication

General public

Expresses a view about specific legislation

~~Call to action~~

**Not** Calls to Action:

- "Learn more"
- "Take action"
- "Support our efforts"
- "Get involved"

➔ **NOT** Lobbying

Pinned Tweet

 **Voices for Children @voicesNE** · Jun 5

The AHCA will cut \$135 mil. in Medicaid funding for NE kids. Contact Sens Sasse & Fischer & tell them not to take health care from our kids!



**THE AMERICAN HEALTH CARE ACT WOULD TAKE HEALTHCARE FROM BABIES!**

*The American Health Care Act (AHCA) makes major changes to Medicaid that will jeopardize health care access for Nebraska kids. Medicaid provides health care for nearly **1 in 3** Nebraska babies born each year and is critical for children with disabilities. The AHCA cuts Medicaid funding by nearly **\$1,000,000,000** and health care coverage for Nebraska children could decline by as much as **52%***

**CALL SENATORS FISCHER (202.224.6551) AND SASSE (202.224.4224) TODAY AND TELL THEM NOT TO JEOPARDIZE HEALTH CARE FOR KIDS BY CAPPING MEDICAID!**

2 2

Pinned Tweet

 **Voices for Children @voicesNE** · Jun 5

The AHCA will cut \$135 mil. in Medicaid funding for NE kids.  
**We cannot take health care from our kids!**



**THE AMERICAN HEALTH CARE ACT WOULD TAKE HEALTHCARE FROM BABIES!**

*The American Health Care Act (AHCA) makes major changes to Medicaid that will jeopardize health care access for Nebraska kids. Medicaid provides health care for nearly **1 in 3** Nebraska babies born each year and is critical for children with disabilities. The AHCA cuts Medicaid funding by nearly **\$1,000,000,000** and health care coverage for Nebraska children could decline by as much as **52%***



## PROTECT CARE FOR 14,500 NEBRASKANS

Programs like Title X ensure that all women have access to quality reproductive health care. These providers offer free or reduced-fee services to at least a portion of their clients. Many patients rely on these health centers as their primary health care provider. Changes to this program hurt low income women and rural health providers the most.

Proposals in the state budget seek to unnecessarily restructure the good work of Title X and these clinics. These ill-advised proposals put these lifesaving services at unknown risks.

Tell your state senator: low-income and rural women need access to well woman exams, lifesaving cancer screenings, STI testing and treatment, and birth control. It's about prevention. It's about health care.

<b>Message Recipients:</b> • Your State Upper Chamber Representatives	<b>Delivery Method:</b> <input checked="" type="radio"/> Email	<b>Your Contact Information:</b> This system requires that you provide your name and contact information. This information will not be used for any purpose other than to identify you to the recipient.
<b>Subject:</b> <input type="text" value="Stop playing politics with women's health"/>		<b>Prefix</b> <small>(required by some officials)</small> <input type="text" value="Select..."/>
<b>Required text:</b> <small>(this text will appear at the beginning of your message)</small> <input type="text" value="I support Title X and family planning clinics in Nebraska."/>		<b>First *</b>

Regulations



Executive Orders



Enforcement of Existing Laws



Litigation

# NOT SPECIFIC LEGISLATION



Nonpartisan analysis, study, or research

Request for technical assistance

Self-defense

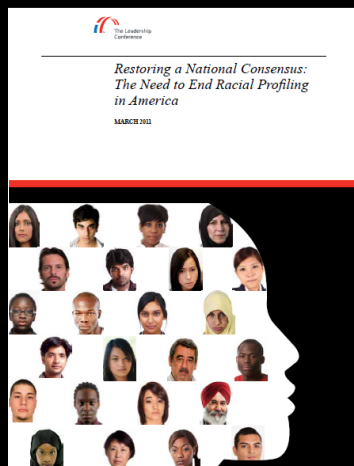
Examinations and discussions of broad social, economic, and similar problems

## LOBBYING EXCEPTIONS

**MUST**  
represent full and  
fair discussion

be broadly  
disseminated

**MAY**  
express a view  
contain indirect  
call to action  
limit subsequent  
grassroots lobbying



NONPARTISAN  
ANALYSIS

## LOBBYING EXCEPTIONS

**MUST BE**

invited in writing on behalf of committee

available to all members of committee

**MAY**

express a view on specific legislation

# TECHNICAL ASSISTANCE



## LOBBYING EXCEPTIONS

**MUST RELATE TO**

powers and duties

tax-exempt status

deductibility of contributions

**SHOULD**

consult with attorney



# SELF-DEFENSE

## LOBBYING EXCEPTIONS

**NO SPECIFIC LEGISLATION**

blue ribbon panel


annual reports

early stages of policy development

**NO CALL TO ACTION**

communication does not include call to action

**ANALYSIS + DISCUSSIONS**



**LOBBYING EXCEPTIONS**



**limit lobbying at all levels of government**



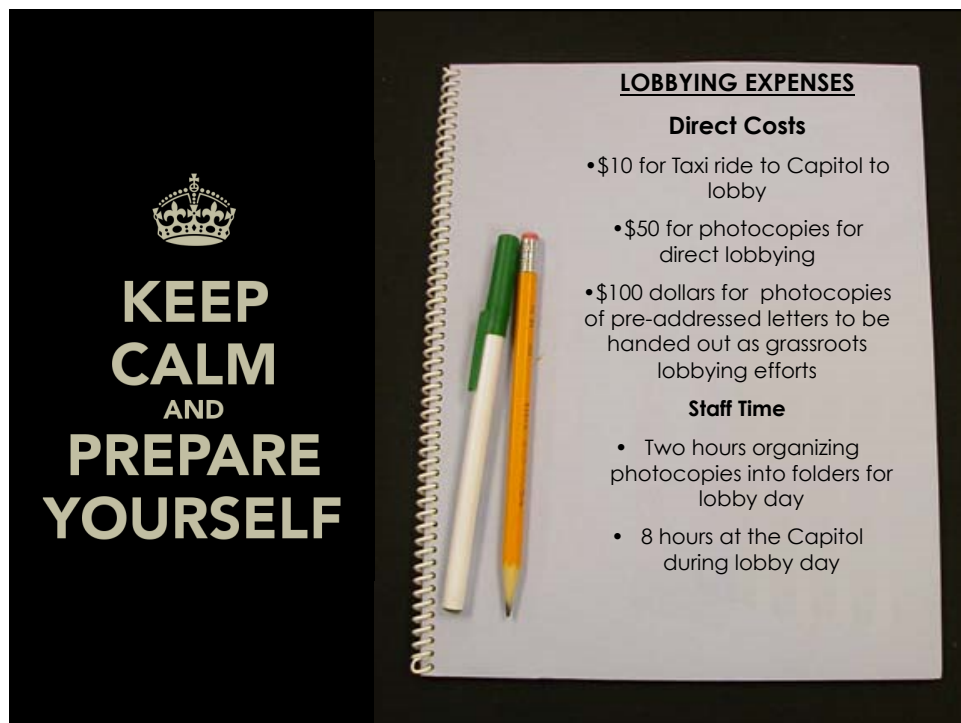
**disclose state / local lobbying**




**disclose federal lobbying**

**LOBBYING LIMITS V. DISCLOSURE**

## KEEPING TRACK



  
**KEEP  
CALM  
AND  
PREPARE  
YOURSELF**

**LOBBYING EXPENSES**

**Direct Costs**

- \$10 for Taxi ride to Capitol to lobby
- \$50 for photocopies for direct lobbying
- \$100 dollars for photocopies of pre-addressed letters to be handed out as grassroots lobbying efforts

**Staff Time**

- Two hours organizing photocopies into folders for lobby day
- 8 hours at the Capitol during lobby day

**1. BE REASONABLE:**

Very few explicit rules

Pick a system that reasonably reflects activities and expenses and isn't overly complicated

**2. BE CONSISTENT:**

Once you decide on a system, avoid frequent changes

Change only to correct problems, not to try to game the system

## GENERAL RULES

Fund Lobbying  
Efforts

General Support

Fund Specific  
Projects

## ADVOCACY FOR FOUNDATION GRANTEES

## Public Charities and “Public Foundations” may **LOBBY**

Must stay within limits set by the IRS

- Insubstantial part test
- OR
- 501(h) expenditure test



A community/public foundation may **EARMARK** a grant for lobbying,

but must count the grant against its own **LOBBYING LIMIT**

## Private Foundations **Tax on Lobbying**

Private foundations pay tax on lobbying expenditures

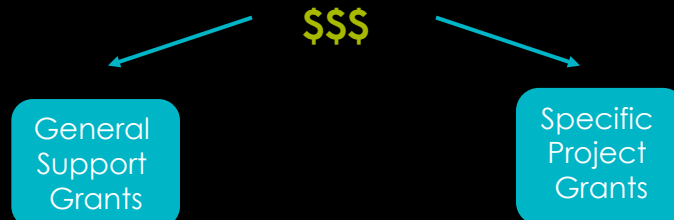
- 20% on foundation; 5% on managers
- 100% on foundation; 50% on managers



Private foundations may not engage in lobbying or **EARMARK** a grant for lobbying

but...

Private foundations may **FUND** grantees that lobby



“A grant by a private foundation is **earmarked** if the grant is given pursuant to an agreement, **oral or written**, that the grant will be used for specific purposes.”

**"EARMARKED"** DEFINED

## **EARMARKED** for Lobbying?



Private  
foundations



Public charities /  
foundations



Private Foundation  
does not **EARMARK** grant

and...

foundation is not legally  
responsible for its grantee's  
lobbying

**GENERAL SUPPORT GRANT "SAFE HARBOR"**

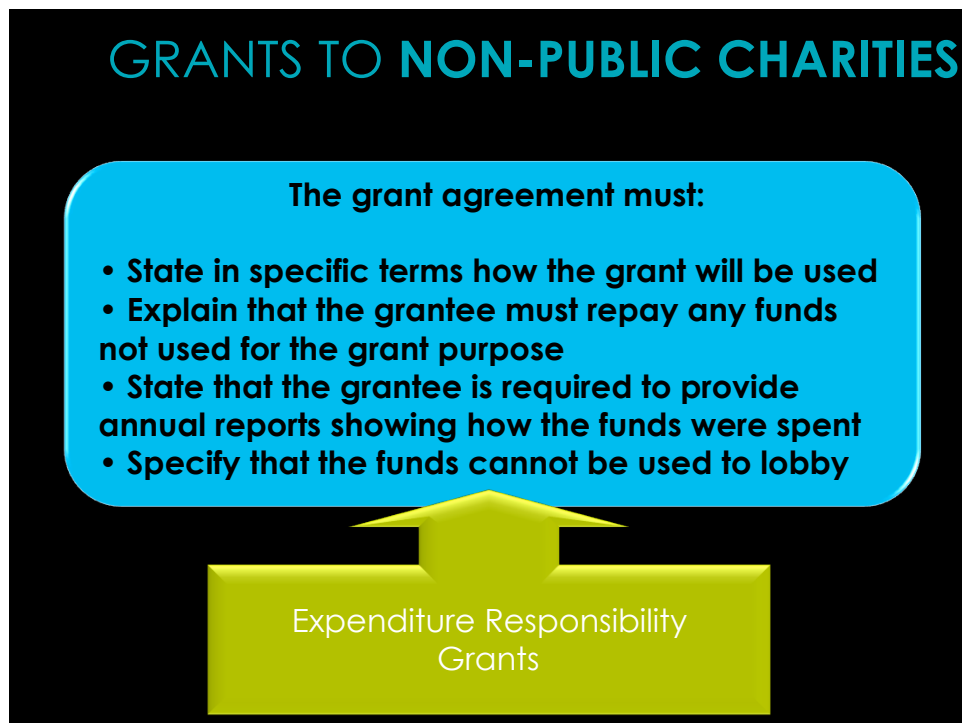
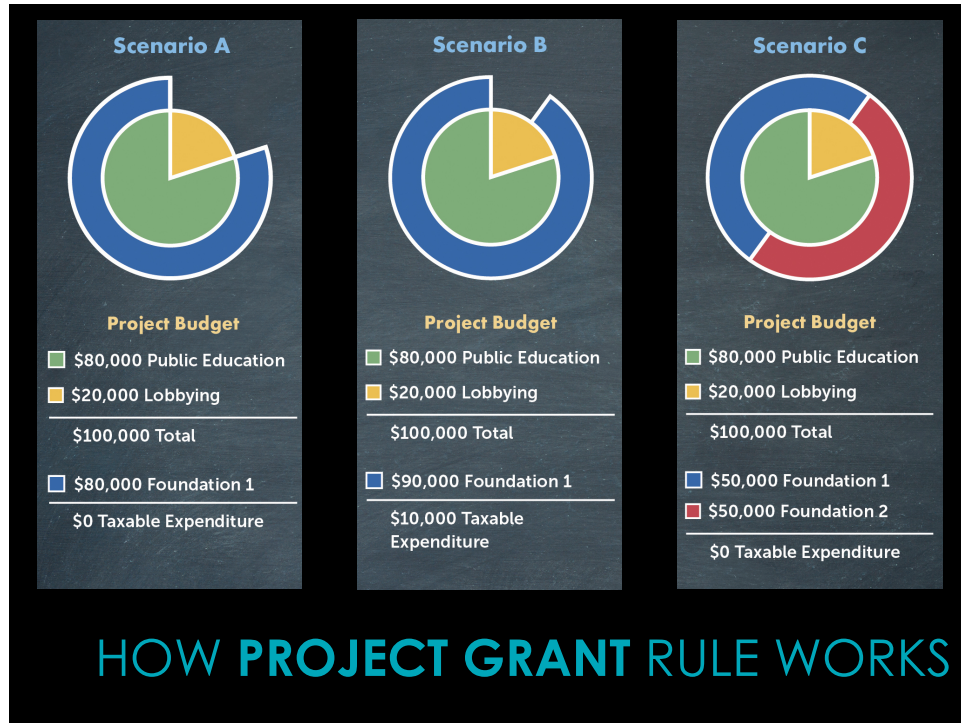
If a private foundation grant is **less than or equal to** a project's non-lobbying component,  
the grant is not a lobbying expenditure.

Foundation grant

$\leq$

Specific project's  
non-lobbying  
amount

**SPECIFIC PROJECT  
GRANT "SAFE HARBOR"**



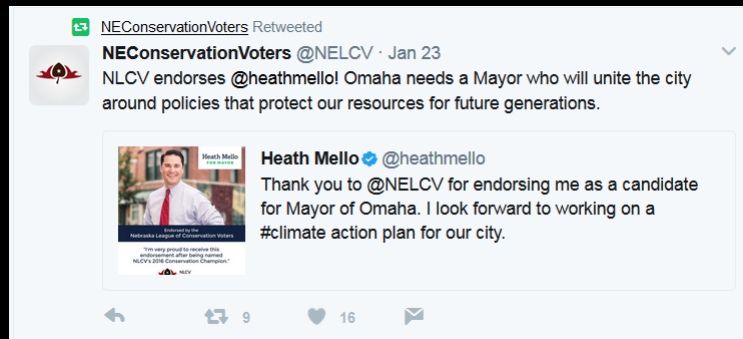
# ADVOCACY AND ELECTIONS FOR NON-PROFITS

KEELY MONROE



	501(c)(3) Private Foundation	501(c)(3) Public Foundation/ Charity	501(c)(4) 501(c)(5) 501(c)(6)
Examples	 	 	  
Tax Treatment	Tax-Exempt Contributions tax-deductible	Tax-Exempt Contributions tax-deductible	Tax-Exempt
Lobbying Activities	<b>EXTREMELY LIMITED</b> Tax on foundation and managers	<b>LIMITED</b> Insubstantial Part or 501(h)	<b>UNLIMITED</b>
Electoral Activities	Cannot support or oppose a candidate for office	Cannot support or oppose a candidate for office	Secondary activity Follow federal and state election law

No 501(c)(3) support for or  
opposition to **CANDIDATES**  
running for **PUBLIC OFFICE**





#### CHARACTERISTICS

Office created by statute

On-going position

Fixed term

Requires oath of office

Includes School Boards



For any public office



Rules that apply to print and verbal communications also apply to  
**ONLINE COMMUNICATIONS**



**INDIVIDUAL  
 PARTISAN  
 ELECTORAL  
 ACTIVITIES**

Personal  
 Capacity Only

Not on  
 Company Time

Organization  
 Cannot Ratify Acts

Have a Policy




**INDIVIDUAL  
PARTISAN  
ELECTORAL  
ACTIVITIES**

Personal  
Capacity Only

Not on  
Company Time

Organization  
Cannot Ratify Acts

Have a Policy




### Sample 501(c)(3) Organizational Policy for Election Season

501(c)(3) organizations may engage in many forms of advocacy, including nonpartisan election-related activity. However, 501(c)(3) resources may not be used for partisan political activities, including supporting or opposing a political party or organization and supporting or opposing candidates for public office. In an election year, it is especially important for 501(c)(3) organizations to remind their staff and volunteers that certain election activities on behalf of the 501(c)(3), or using the resources of the 501(c)(3), are prohibited. Many organizations develop internal policies included in their employee manuals to provide clear guidance to staff.

In your policy, it is important to distinguish between what individuals may undertake in the name of the organization and what individuals who work for 501(c)(3) organizations are permitted to undertake as individuals separate from their organization. Individuals are not prohibited from supporting or opposing candidates in their personal capacity, as long as they do not use 501(c)(3) resources. For more information on this subject, see Alliance for Justice's fact sheet "[Election Activities of Individuals Associated with 501\(c\)\(3\) Organizations](#)."


Below is sample language that you may consider using to notify your staff of these rules. Each 501(c)(3) organization must assess its own level of risk tolerance, and your 501(c)(3) organization may choose to restrict more activities than the example below.



**Keely Monroe**


@KeelyMonroe  
Grew up in upstate NY, left my heart in San Francisco, RJallday, world traveler day dreamer, Counsel at Alliance for Justice. My tweets are my own.

8 Photos and videos




TWEETS 303
FOLLOWING 445
FOLLOWERS 152
LIKES 57
LISTS 1

Tweets
Tweets & replies
Media



**Keely Monroe** @KeelyAFJ · 10m




Spanish-speaking activists: Learn your advocacy rights, w webinars in Spanish! #BeBold [bit.ly/22RcHfH](http://bit.ly/22RcHfH) & [bit.ly/28IBdcU](http://bit.ly/28IBdcU)



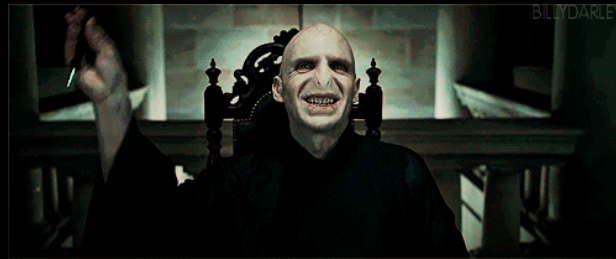
**Keely Monroe** @KeelyAFJ · 2h

Have an advocacy question? Discuss it with @saraAFJustice on Jun 23 at our Oakland @AFJBeBold offices #bebold [bit.ly/1YcPnZt](http://bit.ly/1YcPnZt)


No 501(c)(3) support for or  
opposition to **CANDIDATES**  
running for **PUBLIC OFFICE**

		
Warning Letter	Excise Tax	Revocation of Tax Exempt Status
Possible <b>PENALTIES</b>		





What is **NON-PARTISAN?**



**Who's For Kids?**

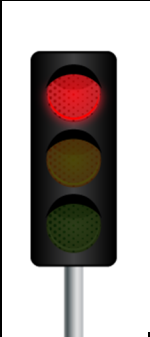
85% of American voters agree that our political leaders are not doing enough to help solve the problems facing children today.

**And Who's Just Kidding?**

*A child can't see through campaign promises, but you can.*

*If government is not about children, then what is it worth?*

**Make your vote count for kids.**



**FACTS AND CIRCUMSTANCES**

KEELY, IS IT **OK TO SEND**  
**THIS** [fill the blank]  
**OUT??..**

## ...IT DEPENDS!

(on the facts and circumstances)

### REMEMBER:

We care about Explicit **AND** Implicit  
Support or Opposition of a Candidate

- Does your organization have a track record of talking about these issues?
- How close in proximity to the election is it?
- How contentiousness is the issue?
- What is your organization's risk tolerance?  
How vulnerable are you willing to be?
- How vital it is to speak out?

## ISSUE ADVOCACY

Lobbying/  
Advocacy  
Campaigns

Supporting or  
Criticizing  
Incumbents

Legislative  
Scorecards

Candidate  
Education

# LOBBYING & ADVOCACY CAMPAIGNS


## ISSUE ADVOCACY

Lobbying/  
Advocacy  
Campaigns

Supporting or  
Criticizing  
Incumbents

Legislative  
Scorecards

Candidate  
Education

.@GovRicketts will you build on NE's #renewableenergy gains, make us a #climate leader in , and have NE join the #USClimateAlliance?



Nebraska Appleseed @neappleseed · 14h

Senate could have copy of health care bill to CBO this week! Call our Senators and tell them Nebraskans demand they #ProtectOurCare

Sen. Deb Fischer (202) 224-6551 Sen. Ben Sasse (202) 224-4224

Hello, my name is \_\_\_\_\_, and I live at [address] in [CITY]. I'm calling to tell the SENATOR they must improve on the affordability and quality of health coverage, not weaken them like the House's bill.

It would be devastating to pass a bill the CBO says would cause 23 million people to lose their coverage. Older Nebraskans can't afford their premiums to skyrocket. And the AHCA's enormous cuts to Medicaid endangers the health insurance of our most vulnerable people.

**Tell your own story about why affordable insurance is important to you**

Every Nebraskan needs affordable health coverage. Any health care bill the Senator supports must preserve Medicaid and also make sure to protect coverage for preexisting conditions, prescription drugs, and important women's health care.

Nebraskans need health coverage to be more affordable and have stronger protections. The AHCA is a huge step backwards.



## LOBBYING OR ADVOCACY CAMPAIGNS

facebook

Search

**Alliance for Justice** Like

Non-Profit Organization · Washington, District of Columbia

**Wall** Alliance for Justice · Everyone (Top Posts)

Share: [Post](#) [Photo](#)

Write something...

**Allen Mattison**  
AFJ fans, vote for Newt Gingrich for President! He'll be great for civil liberties!  
Like · Comment · 2 seconds ago

**Alliance for Justice**

**Long Description**

Alliance for Justice is a 501(c)(3) public charity. Contributions are tax-deductible. Alliance for Justice does not support or oppose candidates for public office.

**General Information**

It is Alliance for Justice's policy not to delete comments posted by the Facebook community, though we may make exceptions when those comments involve personal attacks, obscenity and/or ethnic slurs. Posts from community members do not necessarily represent those of AFJ.

**You and Alliance for Justice**

Lee Flinn likes this.

Planned Parenthood, Human Rights Campaign, The Sierra Club

**People You May Know** See All

**Sean Cosgrove**  
16 mutual friends  
Add Friend

**Amy Herzfeld**  
1 mutual friend  
Add Friend

**Sponsored Story** See All

**ISSUE ADVOCACY**

Lobbying/  
Advocacy  
Campaigns

Supporting or  
Criticizing  
Incumbents

Legislative  
Scorecards

Candidate  
Education

**SUPPORTING OR  
CRITICIZING  
INCUMBENTS**


**SUPPORTING OR  
CRITICIZING  
INCUMBENTS**

Focus on Legislative  
Issues

Continue Ongoing  
Support/Criticism

Don't Support/  
Criticize Personal  
Characteristics

In Astonishing Interview GOP [@RepAdrianSmith](#) refuses to say if Americans are entitled to eat. #Trump



**Perspective | Congressman refuses to say if Americans are entitled t...**

Rep. Adrian Smith, a GOP lawmaker from Nebraska, is a key figure on agriculture policy.

[washingtonpost.com](http://washingtonpost.com)

CRITICIZING  
OR SUPPORTING INCUMBENTS



**Adrian Smith**  
@AdrianSmithNE

- Home
- About
- Endorsements
- Photos
- Likes
- Post
- Events
- Posts

Create a Page

# Adrian Smith



**vote**  
CONGRESSMAN  
ADRIAN SMITH

**About**

This is the Facebook page for Congressman Adrian Smith's re-election campaign. Please check out my website at [www.joinadrian.com](http://www.joinadrian.com)



United States Congressman  
**ADRIAN SMITH**  
Serving the 3rd District of Nebraska

Services | Issues & Legislation | Newsroom | Resources | Contact Adrian | About the District | About Adrian

**SIGN UP to receive my e-newsletter!**

Stay informed on issues and actions from Capitol Hill that are important to you, our district and our country.

**SIGN UP FOR MY E-NEWSLETTER**

Stay connected and give me your feedback by signing up for my free e-newsletter.

**ACTION CENTER**

- Apply for an Internship
- Track a Bill
- Email Adrian
- Help with a Federal Agency
- Schedule a Meeting
- Visiting Washington D.C.
- Flag Request
- Youth Advisory Council

**Enewsletter**  
Sign up to receive email updates

RESPONDING TO  
CANDIDATES

Continue to Focus  
on Your Public  
Policy Issues, Not  
the Candidate

Don't Comment to  
Influence the  
Elections

Avoiding  
Mentioning the  
Name of the  
Candidate

Don't Criticize  
Personal  
Characteristics

RESPONDING TO  
CANDIDATESRESPONDING TO  
CANDIDATES

Continue to Focus  
on Your Policy  
Issues, Not the  
Candidate

Don't Comment to  
Influence the  
Elections

Avoiding  
Mentioning the  
Name of the  
Candidate

Don't Criticize  
Personal  
Characteristics

December 8, 2015

“Barring a group of people from entering our country based solely on their faith is blatantly unlawful and fundamentally un-American.

We are a nation of immigrants, many of whom came to this country to escape prejudice and discrimination.

We urge all of our political leaders to categorically reject this dangerous escalation of hateful rhetoric.”

— Anthony D. Romero  
Executive Director, ACLU

ACLU

RESPONDING TO  
CANDIDATES

# LEGISLATIVE SCORECARDS

**ISSUE ADVOCACY**

Lobbying/  
Advocacy  
Campaigns

Supporting or  
Criticizing  
Incumbents

Legislative  
Scorecards

Candidate  
Education




Sent to <b>PUBLIC</b>	Sent to <b>MEMBERS</b>
Published <b>REGULARLY</b>	Published <b>REGULARLY</b>
Includes <b>ALL LEGISLATORS</b>	Includes <b>ALL LEGISLATORS</b>
<b>BROAD</b> Range of Issues	<b>NARROW</b> Range of Issues
<b>AVOIDS</b> Commentary	Commentary <b>ALLOWED</b>



**WOMEN ARE WATCHING** **Planned Parenthood Action Fund**

CANDIDATES ISSUES BLOG [DONATE](#) [GET UPDATES](#)

## Champ & Chump Chart

Here's a quick look at where the 2016 presidential candidates stand on three of Planned Parenthood's top issues.

[VIEW MORE ON EACH CANDIDATE HERE +](#)

### Champ & Chump Chart

	On Access to Abortion	On Affordable Birth Control	On Family Planning
Mitt Romney	Opposes access to safe and legal abortion	Opposes affordable birth control	Opposes affordable family planning services
Chris Christie	Opposes access to safe and legal abortion	Opposes affordable birth control	Opposes affordable family planning services
Ben Carson	Opposes access to safe and legal abortion	Opposes affordable birth control	Opposes affordable family planning services
Hillary Clinton	Supports access to safe and legal abortion	Supports affordable birth control	Supports affordable family planning services
Marco Rubio	Opposes access to safe and legal abortion	Opposes affordable birth control	Opposes affordable family planning services

## ISSUE ADVOCACY

- Lobbying/  
Advocacy  
Campaigns
- Supporting or  
Criticizing  
Incumbents
- Legislative  
Scorecards
- Candidate  
Education

**2012 Briefing Book for Candidates and Voters**

**The Candidate's Guide to Climate Change**  
Last updated: May 3, 2016

A Non-Partisan Messaging Guide

[Share This](#)

## CANDIDATE EDUCATION

## CANDIDATE EDUCATION

Offer to all

Use only what is  
already gathered

Only create new  
information if  
organization has  
reason to do so

### OCPP OREGON CENTER for PUBLIC POLICY

Because facts matter.

June 3, 2008

«AddressBlock»

«GreetingLine»

As a candidate for «For\_Office» I want you to know that the Oregon Center for Public Policy has a wealth of information that is available to all candidates for public office and encourage you to visit our website and contact our office if you need information about budget, tax or economic issues important to low- and moderate-income Oregonians.

While OCPP is a non-partisan public policy research institute that does not get involved promoting or opposing candidates for elective office, our information on our website and from our staff is available to anyone, including candidates.

If you contact us for information we will try our best to provide you with the timely, credible and accessible information that's been our hallmark for over a decade.

## VOTER EDUCATION

candidate  
questionnaires

candidate debates  
and forums

candidate  
appearances

appearances  
unrelated to  
candidacy

# CANDIDATE QUESTIONNAIRES

**QUESTIONS**

Unbiased Questions

Open-Ended Questions

Distribute to all Candidates

Broad Range of Issues

No Pledges

**FORMATTING**

No Editing

Present Responses Equally

Disclaimers

### 2014 VOTER'S GUIDE Iowa Gubernatorial Candidates' Views on Children and Families




Gov. Terry Branstad  
Republican Candidate

State Sen. Jack Hatch  
Democratic Candidate

**QUESTION ONE  
THE STATE BUDGET AND CHILDREN**

*In the federal system, state government has the primary responsibility to finance education, health and human services for children. Over two-thirds of the Iowa general fund budget is devoted to serving children and youth – through early childhood, K-12, and higher education; child health and mental health care; and child safety services in child welfare and juvenile justice. Since 2000, and through two recessions and resulting state revenue shortfalls, many state-funded programs serving children have experienced very significant cutbacks, which have not been restored even as state revenue has returned. The Iowa budget now has a substantial surplus – and the next Governor and General Assembly will be looking toward the future in formulating the 2014-2015 state budget.*

**As Governor, what will you do to ensure that needed investments in children and youth are included in the 2014-15 budget?**

**Terry Branstad:**  
Since taking office in 2011, my primary focus has been to provide stability and predictability to the state budget. As Governor, I have successfully implemented a two year budget and each year provide a five year budget projection to ensure expenditures align with revenues. This is important because programs that rely on state tax dollars are now sustainable. This approach means we are now able to invest in strategic initiatives benefiting Iowa children. The budget I signed for Fiscal Year 2015 provided \$215.3 million in education funding for Iowa students. Restoring responsibility and predictability to the budgeting process means we are now able to invest more in pre-K-12 education than ever before. Unfortunately, this was not the case a few short years ago. As a result of the bad budgeting practices of the past, programs were cut across the board by ten percent. This action was unfairly leveled on Iowa's children. Over the next several years, I will uphold my commitment to budget stability and predictability so Iowa children and their parents have confidence that the state programs they rely upon will be there in the future.

**Jack Hatch:**  
The well-being of Iowa's children will be a priority in a Hatch administration. We'll create a new Department for Iowa Children that will break off from the Department of Human Services and bring together children's services from other agencies to make certain a cabinet-level focus remains on Iowa kids, especially those who are most at risk. We will restore the Iowa Juvenile Home to serve the most vulnerable children who have been adjudicated delinquent. We will evaluate every level of care for children in state custody to ensure we're not continuing negative outcomes including isolation and lack of educational services. We'll ensure frontline Department of Human Services caseworkers have the tools and resources they need to assist families in overcoming challenges related to poverty, substance abuse and the physical and emotional abuse of children, with the well being of the child as the paramount consideration.

*he candidates answered ten questions on important child and family policy issues. All responses are printed without editing.*

Developed as a public service by Every Child Counts  
the Children's Policy Coalition  
September 2014



Advocating for Iowa's kids

**QUESTIONS**

unbiased questions

open-ended questions

distribute to all candidates

broad range of issues

no pledges

**FORMATTING**

no editing

present responses equally

disclaimers

Neither the League of Women Voters Education Fund nor any of its partners takes any position on or expresses any preference about the issues or candidates displayed on this site. The League of Women Voters **does not support or oppose candidates or political parties**

## VOTER EDUCATION

candidate  
questionnaires

candidate debates  
and forums

candidate  
appearances

appearances  
unrelated to  
candidacy

# DEBATES & FORUMS

## QUESTIONS

Unbiased Questions

Broad Range of  
Issues

## FORMAT

Invite all Viable  
Candidates

Fair Rules

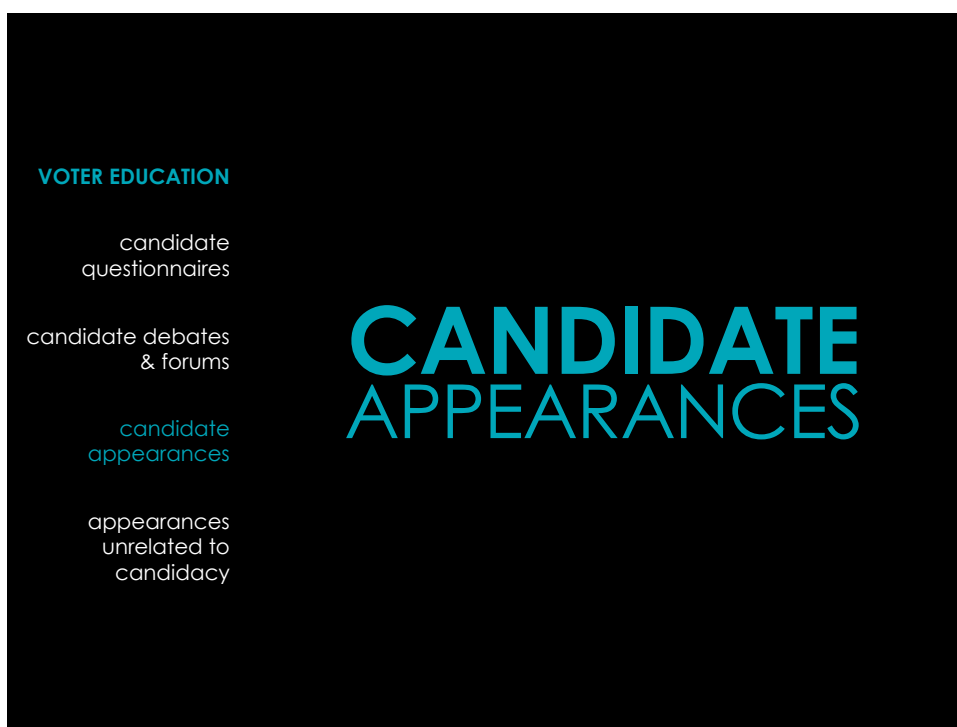
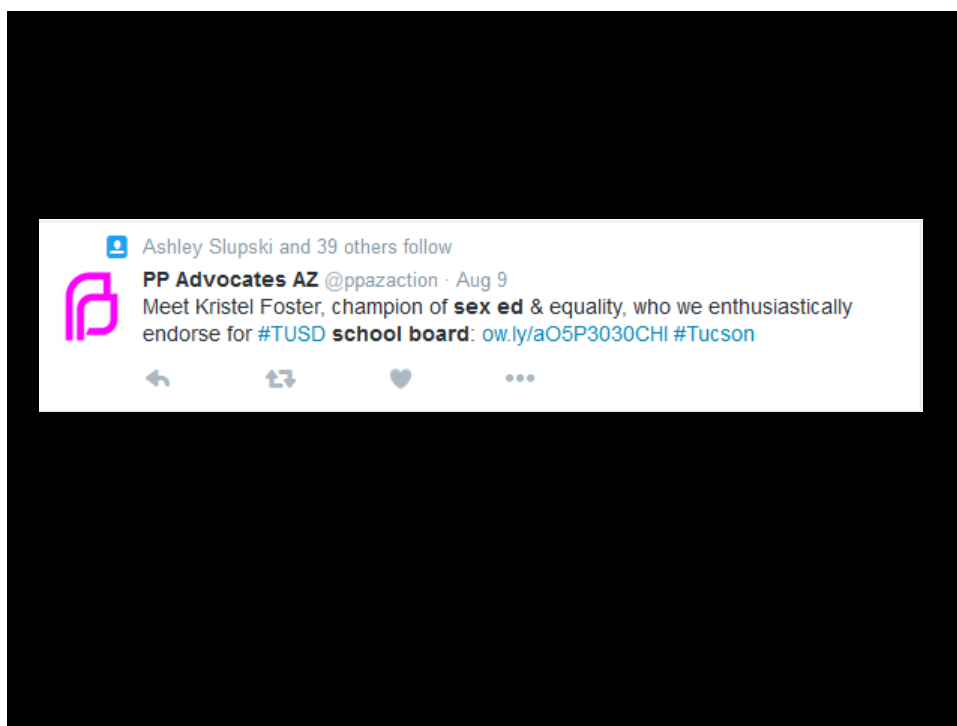
Impartial Moderator

Unbiased Audience

Equal Opportunity

No Contextual  
Favoritism





### CANDIDATE APPEARANCES


Equal opportunity required

No contextual favoritism

Invite all viable candidates


## OMAHA MAYORAL RACE

DEMOCRAT



HEATH MELLO

REPUBLICAN



JEAN STOTHERT

### VOTER EDUCATION

candidate questionnaires

candidate debates and forums

candidate appearances

appearances unrelated to candidacy

# APPEARANCE UNRELATED TO CANDIDACY

## APPEARANCE UNRELATED TO CANDIDACY

Awards & Policy  
Updates

No Equal  
Opportunity  
Required

Avoid Mentioning  
Candidacy

Don't Time to  
Coincide with  
Election

Disclaimers and  
Letters



# VOTER REGISTRATION & GOTV

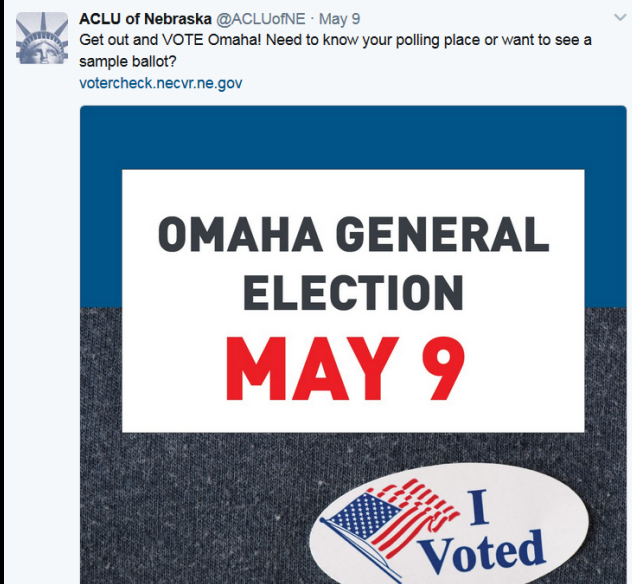
## VOTER REGISTRATION

No Reference  
to Party/Candidate

No Suggestion of  
Who to Vote For

Make Service  
Available to  
**EVERYONE**

Targeting for  
**NONPARTISAN**  
Reason



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**NONPARTISAN**  
Reason








**NO INCENTIVES** FOR  
VOTER REGISTRATION AND/OR  
GOTV

**BALLOT MEASURE  
ADVOCACY**

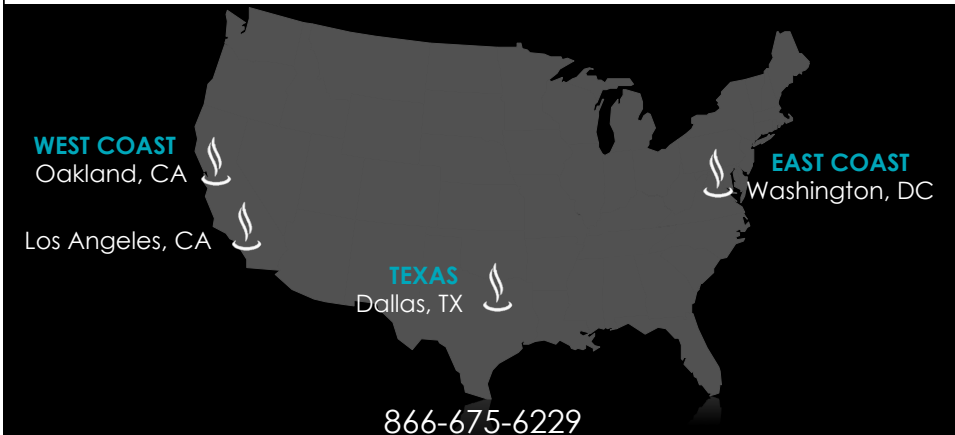


Advocating for or against a ballot measure is **lobbying**, not political.

**YOU CAN DO IT!**



**BOLDERADVOCACY**  
*An initiative of Alliance for Justice*



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