



GREATER NEW ORLEANS
FOUNDATION

For a vibrant region.

Nonprofit Advocacy 101

Impact Through Advocacy

Advancing your Mission in the Policy Arena

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Louisiana Budget Project
February 18, 2014

Working Agreements

Recognize we are all at different levels,
with varying experiences. Celebrate the
diversity and the learning

Cell phones off or on vibrate

One conversation at a time– no
sidebars

Vegas Rule

Parking Lot



Introductions

1 MINUTE with your partner:

Name

Organization

Role—Position

What's the word or image that comes to mind when you think of "Advocacy"?

4 MINUTES with your team:

Name

Organization

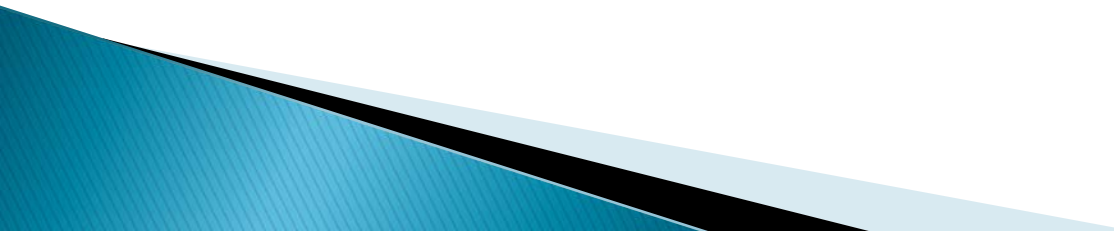
Role—Position

What's the word or image that comes to mind when you think of "Advocacy"?

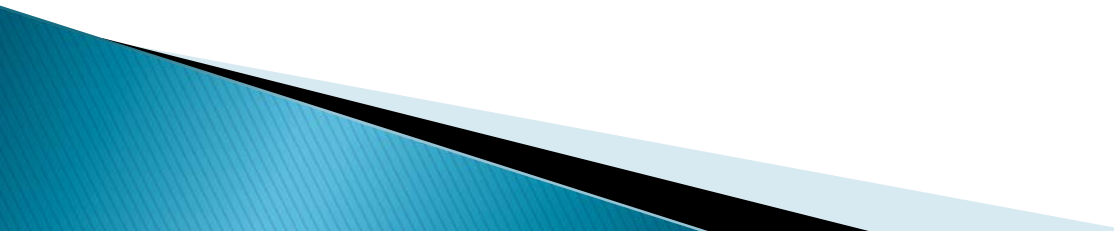
POPCORN RESPONSES



Why Nonprofits Should Get Involved:

- ▶ Direct service is not enough
 - ▶ Government policies affect your nonprofit and your clients
 - ▶ Policymakers care about and need your expertise
- 

Advocacy vs. Lobbying

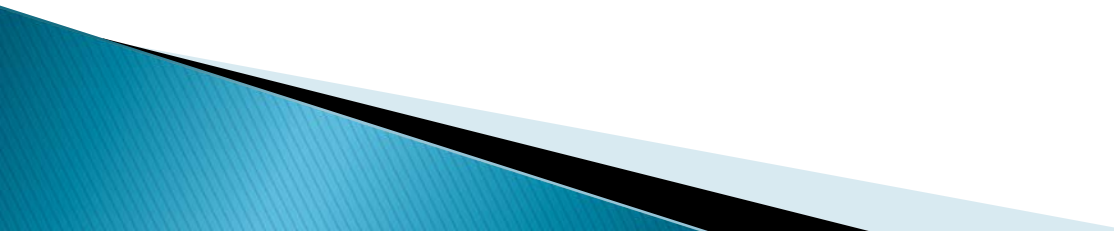
- ▶ Advocacy is education and the transference of knowledge.
 - ▶ Lobbying is an attempt to influence legislation through direct contact with public officials at the local, state and federal levels.
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Is 501(c)3 Lobbying Legal?

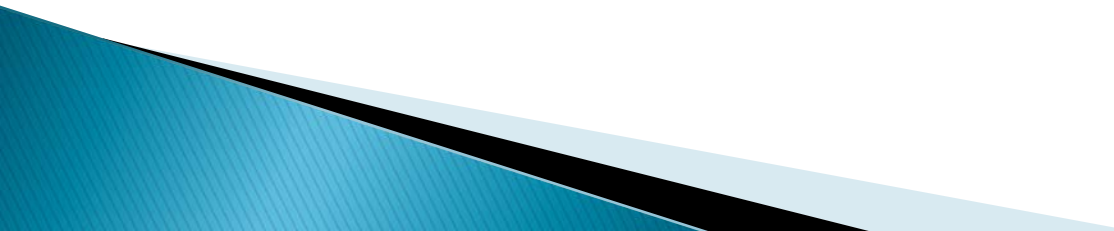
- ▶ YES! Lobbying by charitable nonprofits tax-exempt under section 501(c)(3) of the Internal Revenue Code is legal.



IRS Rules on 501(c)3 Lobbying

- ▶ 501(c)3 organizations may engage in a limited amount of legislative lobbying under either the:
 - “substantial part” test or
 - under the **Section 501(h)** of the tax code.
- 

IRS Rules on 501(c)3 Lobbying

- ▶ “Substantial part” tests on the basis of the facts and circumstances, such as the time (by both paid and volunteer workers) and the expenditures devoted to lobbying by the organization.
- 


IRS Rules on 501(c)3 Lobbying

Under the 501(h) expenditure test, nonprofits may spend:

On Direct Lobbying:

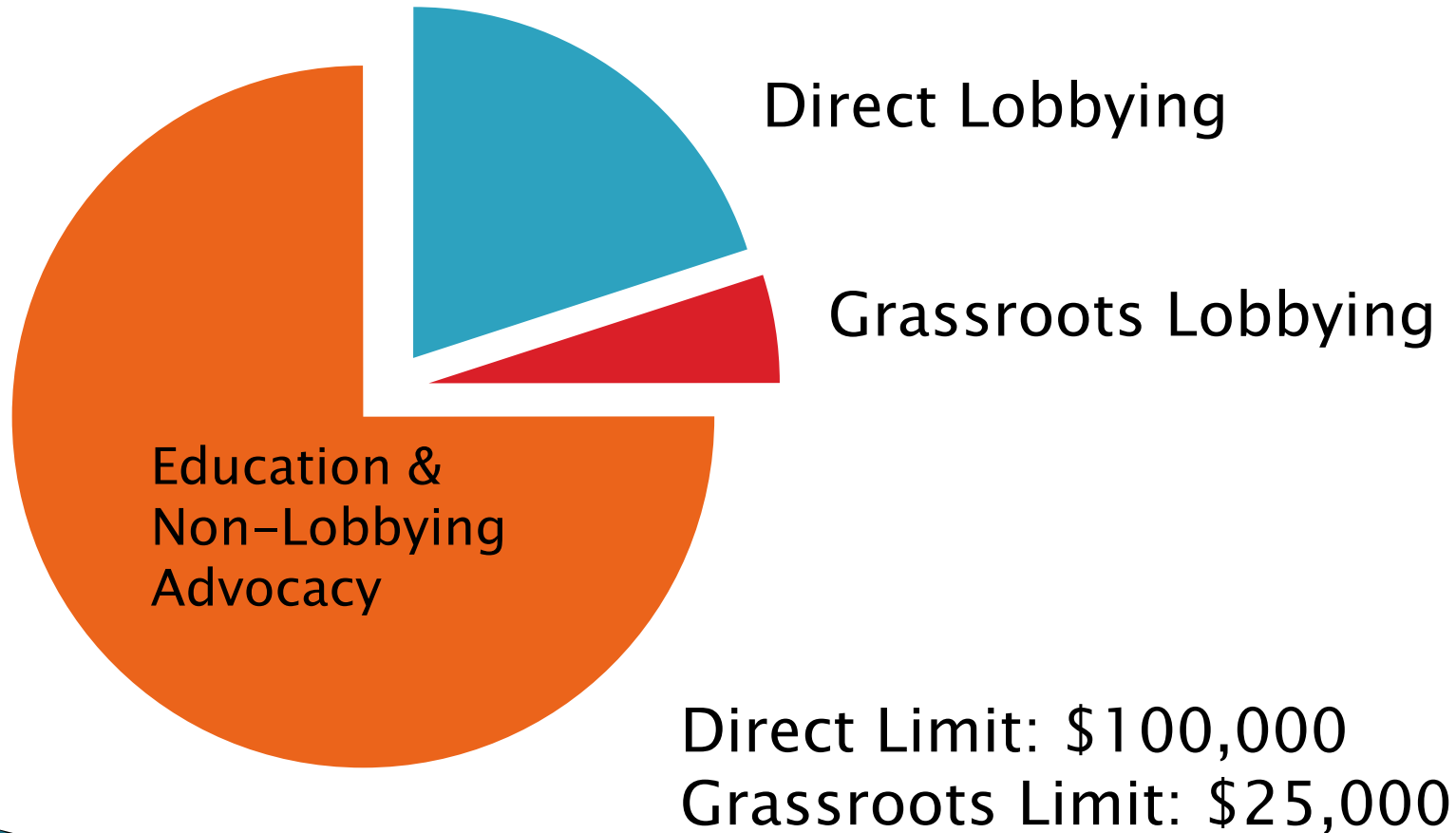
- ▶ 20% of the first \$500,000 of its exempt purpose expenditures;
 - 15% of the next \$500,000, and so on, up to one million dollars a year.

On Grassroots Lobbying:

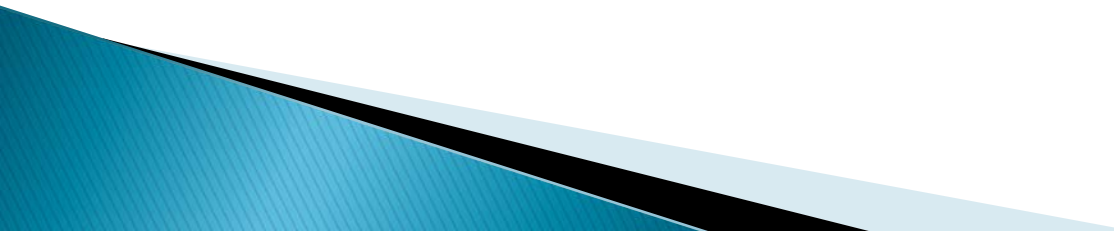
- ▶ 5% of the first \$500,000 of its exempt purpose expenditures;
 - 3.75% of the next \$500,000, and so on, up to \$250,000 a year.
- 

Total Lobbying Limits

for 501©3s making the 501(h) election with annual expenditures of \$500,000



Two Kinds of Lobbying

- ▶ **Direct lobbying**: an attempt to influence legislation through *direct contact* with public officials (or staff) at the local, state and federal levels .
 - ▶ **Grassroots lobbying**: *asking the general public* to influence legislation by contacting public officials (or staff) at the local, state, or federal levels.
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Direct Lobbying:

When YOU:

- Visit
- Call
- Email

a legislator or his/her staff and encourage support or opposition of a bill.



Grassroots Lobbying:

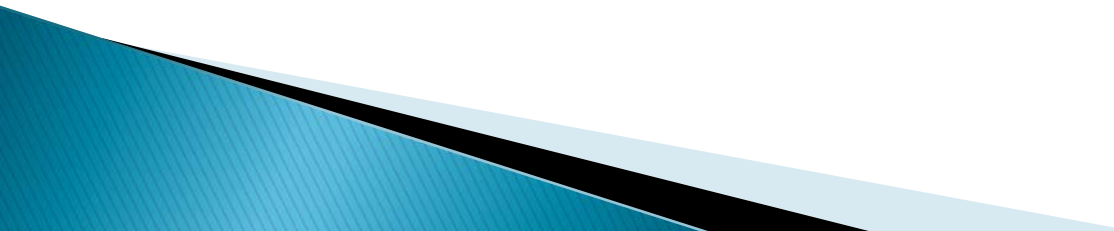
When YOU ASK
SOMEONE ELSE to:

- Visit
- Call
- Email

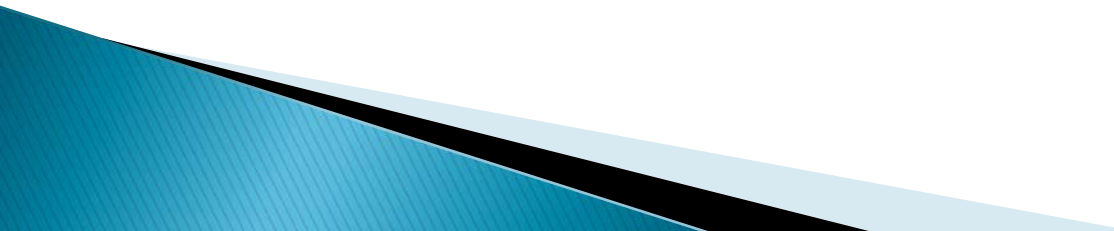
a legislator or his/her
staff and encourage
support or opposition of
a bill.



Examples of Grassroots Lobbying

- ▶ Encouraging the public to contact their legislators to support or oppose a bill
 - ▶ Giving contact information of legislators for the purpose of influencing legislation
 - ▶ Providing a petition, postcard, or other similar vehicle for sending a prepared message to legislators
 - ▶ Identifying one or more legislators as lobbying targets
- 

Lobbying Exclusions

- ▶ Regulation Changes
 - ▶ Volunteer Lobbying
 - ▶ Member Communication
 - ▶ Technical Advice to a Legislative Body
 - ▶ Self Defense Activity
 - ▶ Nonpartisan Analysis and Research
 - ▶ Broad Issues
- 

Louisiana Ethics Laws

Lobbyist Registration

▶ Legislative Branch

- 20% or more of your principle job duties
- Make an expenditure in the act of lobbying



▶ Executive Branch

- Make an expenditure in the act of lobbying



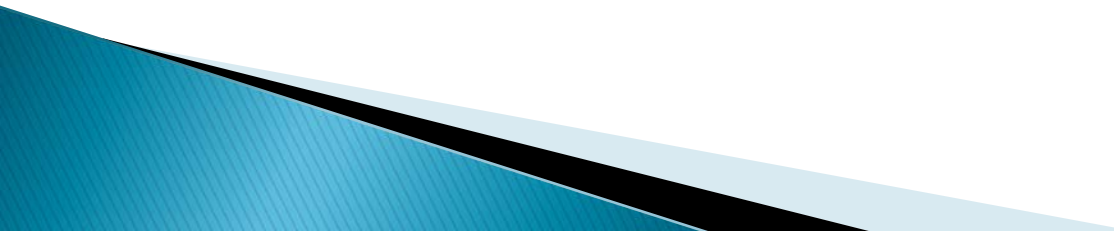
Louisiana Ethics Laws

Gifts to Elected Officials

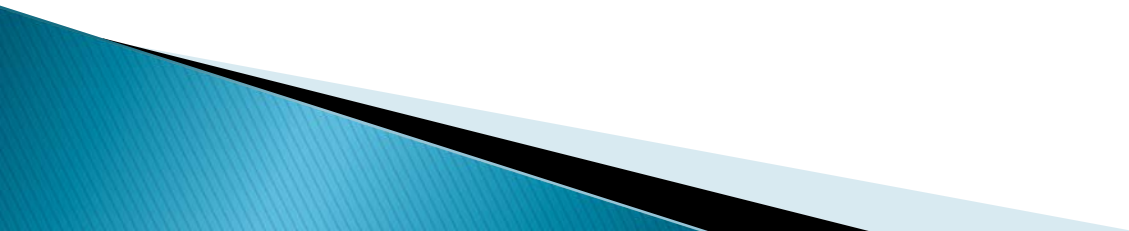
▶ **May Not Accept:**

- Public Servants may not accept anything of economic value

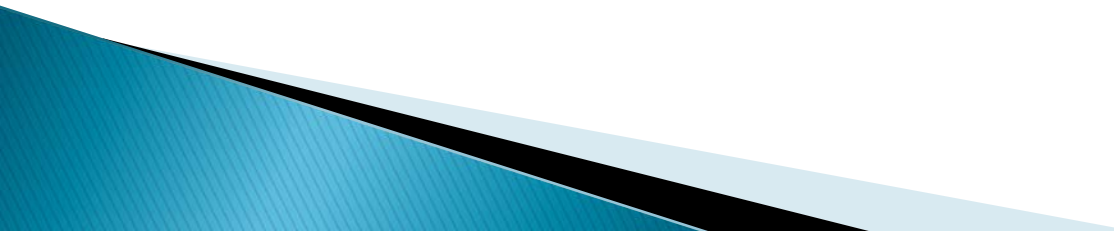
▶ **May Accept:**

- Promotional items with no substantial resale value such as pens, hats, or mugs with your logo on it. (Not an ipad with your logo on it)
 - Food and drink when consumed in the presence of the giver. Cost may not exceed \$56.
- 

How to Start Advocating

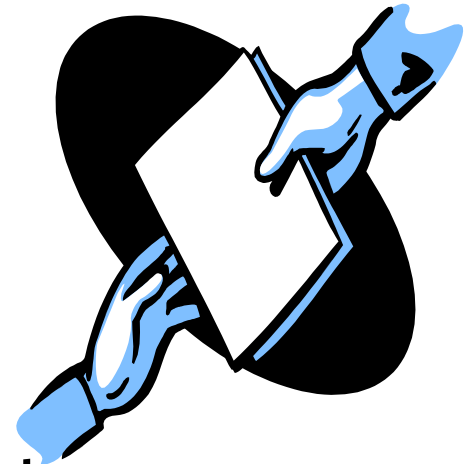


How to Start Advocating

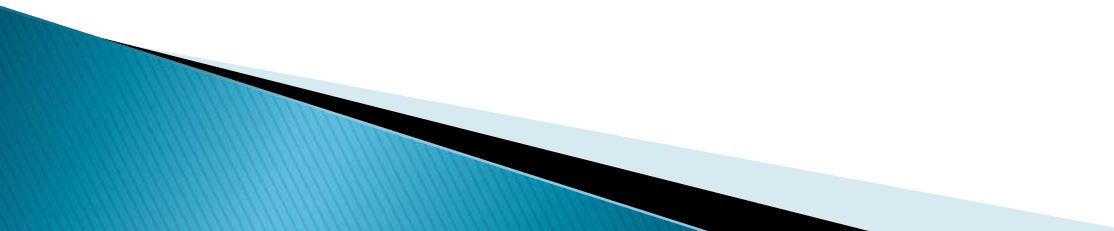
- ▶ Identify the problem, goal and strategy
 - ▶ Create a legislative agenda or platform for your organization
 - ▶ Learn the history of your issue
 - ▶ Gain a basic understanding of how a bill becomes law
- 

Advocacy Campaigns

1. Mobilize your base
2. Strengthen your coalition
3. Set goals & prioritize
4. Strengthen your knowledge
5. Analyze and use your power
6. Build relationships with legislators
7. Communicate with legislators & staff
8. Monitor the issue



Mobilize Your Base

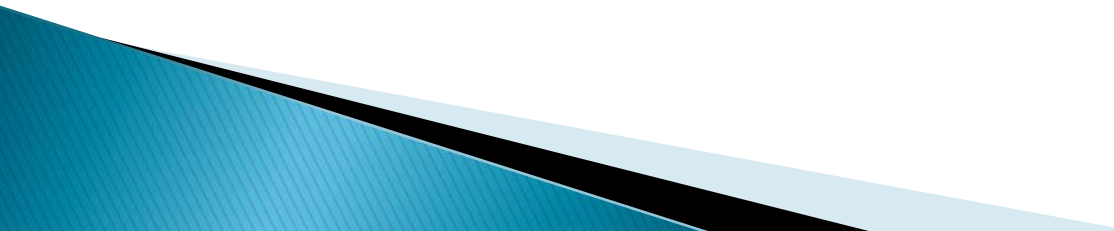
- Encourage your organization to get involved in advocacy/make the case of why it's important
 - Create an ongoing flow of information about advocacy in all of your meetings
 - Stay connected with organizations that are on the “frontline” of the issue
 - Include legislative information in all communications: newsletter, website, blog
- 

The Benefits of Coalitions

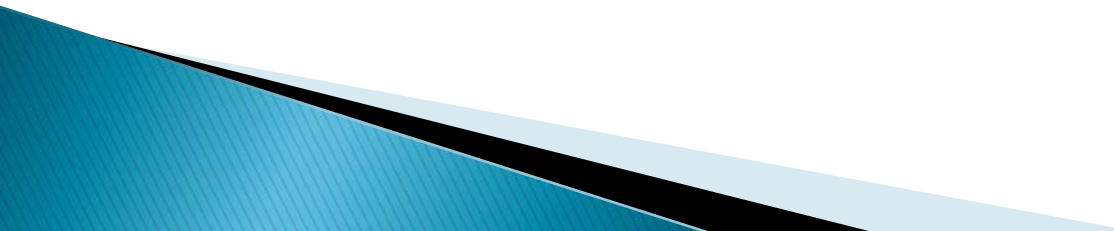
- ▶ Advocacy feel easier and less intimidating
- ▶ “Power in numbers”
- ▶ Diversity and a mix of expertise
- ▶ Cross section of community support



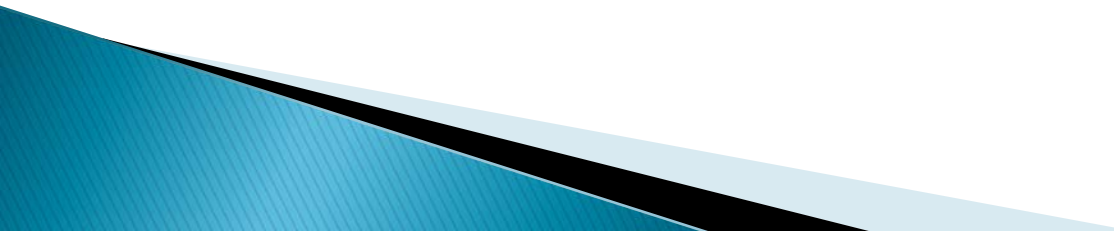
Coalitions

- ▶ Individuals / Members / Organizations
 - ▶ Identify existing coalitions and urge them to get involved with advocacy
 - ▶ Build or get involved in a coalition that has the same issue and goals
- 

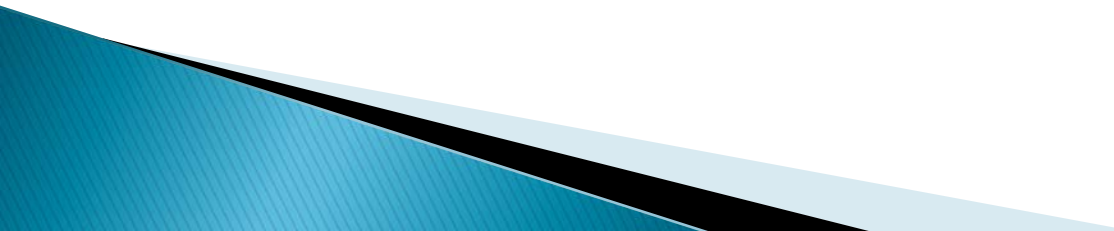
Successful Coalitions

- ▶ Be active and committed to reach the end goal
 - ▶ Utilize the expertise of all coalition members
 - ▶ Build consensus: coalition should represent the shared agreement among members
 - ▶ More seasoned advocates take the lead while educating the less experienced ones
 - ▶ Legislation typically moves slowly so keep momentum going and stay persistent
 - ▶ Remain poised for action when legislation does finally start to move
- 

Set Goals & Prioritize

- ▶ **What is the goal?** Examples: 1.) Pass legislation 2.) Build better relationships with your legislators 3.) Maintain state funding 4.) Introduce new legislation
 - ▶ **Prioritize:** 1.) Decide which level of government to focus on 2.) Decide which issue/s to work on 3.) Decide which legislator (s) to focus on
- 

Strengthen Your Knowledge

- ▶ Get legislative information from a legislator's office or government website
 - ▶ Secure current statistics and facts
 - ▶ Understand the history and background
 - ▶ Track media coverage
- 

Analyze the Power



Who has the power?

Federal?

State?

Local?

Gain a better understanding of your target:

What or who influences them?

How did they get into office?

Are they involved with any nonprofits or passionate about a mission?

Navigating the Legislative Session



*Do Your
Homework
Before Session
Begins!!*

Advocacy Tips

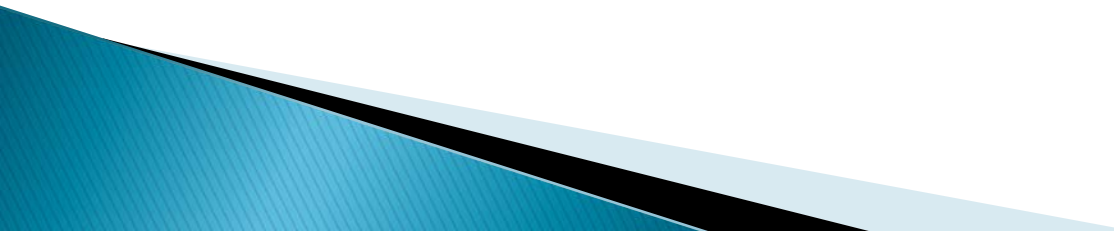
Relationship Building

Don't wait to ask a stranger for a favor.

- ▶ Invite your Elected Officials to your Offices or Event
- ▶ Visit their District Office
- ▶ Host a Town Hall Meeting
- ▶ Host a Candidate Debate

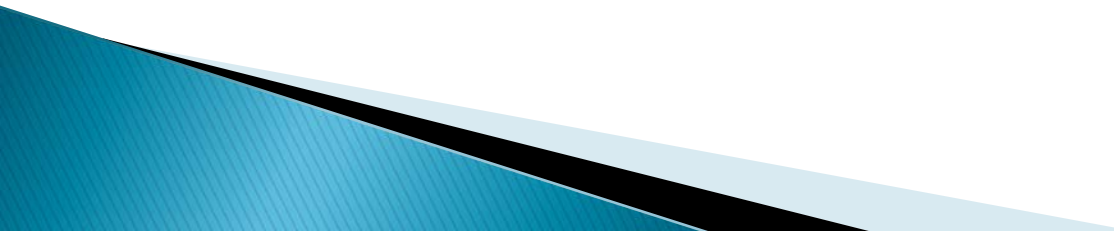


Build Relationships with Legislators & Staff

- ▶ Invite legislators and staff to your events
 - ▶ Schedule an in person meeting
 - ▶ Town hall meetings
 - ▶ Candidate debates/events
- 

Advocacy Tips

Meeting with Legislators

- ▶ Have an agenda in mind; assign roles of attendees
 - ▶ Always be polite and/but honest
 - ▶ Be as direct and concise on your issue as possible
 - ▶ Provide district level data
 - ▶ Let them know you want to be a resource
 - ▶ Leave something behind (but not too much!)
- 

Use Your Power

You are an expert about your issue!

Use your expertise to educate legislators about your issue and why it's a priority.

Share personal stories and data about how policy decisions will impact your community.



Legislative Session Basics



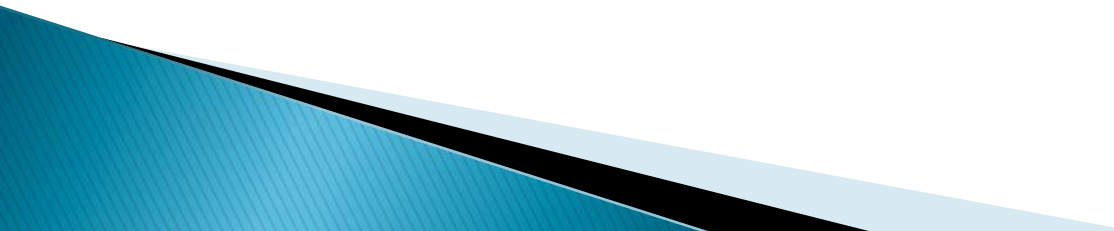
LA Legislative Session Basics

Subject Matter

- ▶ Even Numbered Years: Non-Fiscal Session
 - No bills imposing a tax can be introduced
- ▶ Odd Numbered Years: Fiscal Session Only Session
 - Five non-fiscal bills allowed per member

LA Legislative Session Basics

Timelines: State Budget (HB1)

- ▶ Agencies Submit Budget Recs. Nov 15
 - (advocates should reach out b/w July and October)
 - ▶ Gov puts Exec Budget Together Mid Nov – Feb
 - ▶ Executive Budget Released 45 Days Before Session Begins
 - ▶ Approps. Comm. Meets 2 Weeks Before Session Begins and Continues Throughout.
- 

LA Legislative Session Basics

Timelines: Bill Introduction

- ▶ Legislators May Prefile Unlimited # of Bills Until the Filing Deadline.
- ▶ Deadline for prefiling is 5pm on the 10th Calendar Day Before the Session.
 - After the deadline, they can only file 5 additional bills.
- ▶ Constitutional Amendments must be prefiled 10 Full Days Before start of Session

LA Legislative Session Basics

Finding an Author or Ally

- ▶ Approach the Elected Official in Your District



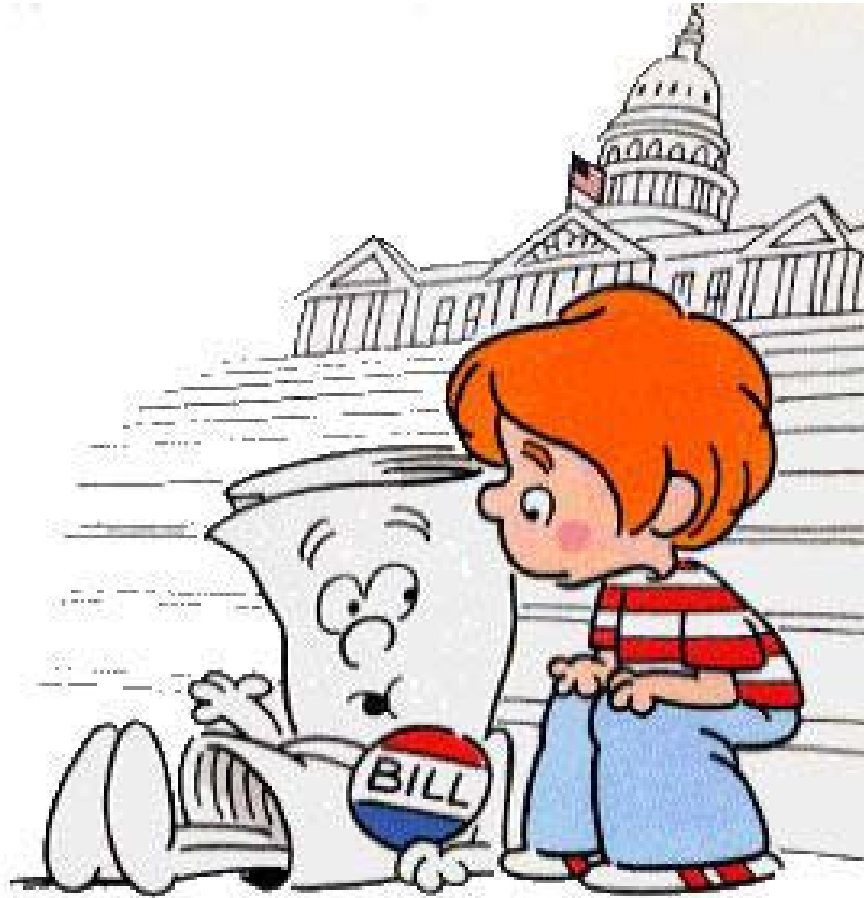
Or



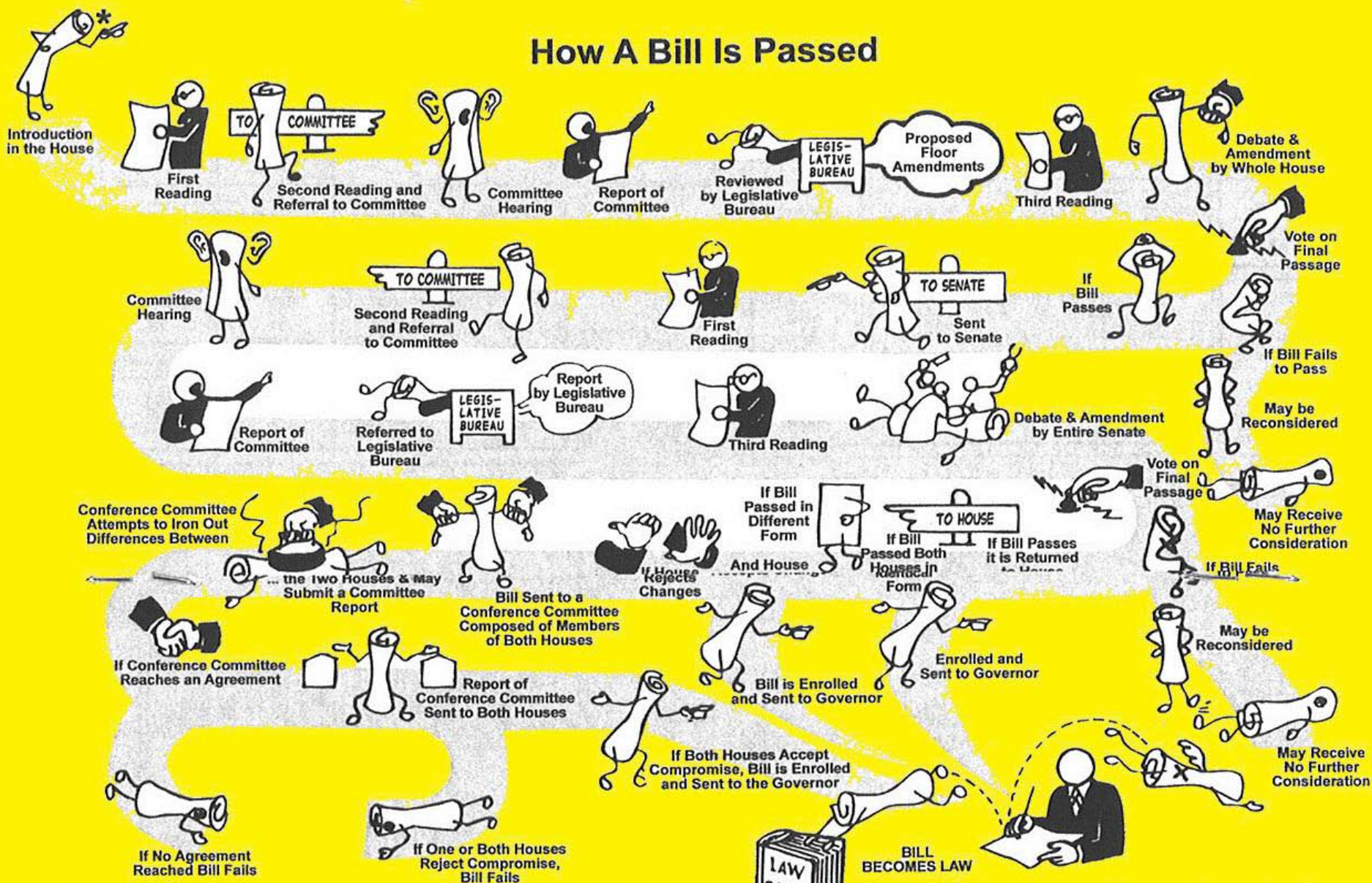
- ▶ Identify a Champion for Your Cause

Legislative Process

How a Bill Becomes a Law



How A Bill Is Passed



This chart traces a bill introduced in the House. A bill introduced in the Senate would follow this same procedure shown in the chart with Senate and House action reversed. Bills to appropriate money and raise revenue must originate in the House.

* Legislative rules allow committees to provisionally hear and report prefiled bills before the session starts. Process depicted here assumes bill has not been heard and reported prior to the start of the session

Legislative Process

Testifying In Committee

HOUSE WITNESS CARD - AFFIRMATION* IN OPPOSITION

Committee: _____ Date: _____

Regarding: HB No. _____ HCR No. _____ HR No. _____
SB No. _____ SCR No. _____ Other: _____

CHECK ONE:

- ☐ I would like to speak
- ☐ I will provide information, if requested
- ☐ Although I do not wish to speak, I am in support

PLEASE PRINT:

Name: _____
Representing: _____
Address: _____

Primary telephone: _____
e-mail address: _____

*Your signature required on the back hereof is certification that your testimony is true and correct and an acknowledgment that you are testifying under oath.

SENATE WITNESS CARD - INFORMATION ONLY

Committee: _____ Date: _____

Regarding: SB No. _____ SCR No. _____ SR No. _____
HB No. _____

CHECK ONE:

- ☐ I would like to speak
- ☐ I will provide information, if requested
- ☐ Although I do not wish to speak, I am in support

PLEASE PRINT:

Name: _____
Representing: _____
Address: _____

Primary telephone: _____
e-mail address: _____

HOUSE WITNESS CARD - AFFIRMATION* IN SUPPORT

Committee: _____ Date: _____

Regarding: HB No. _____ HCR No. _____ HR No. _____
SB No. _____ SCR No. _____ Other: _____

CHECK ONE:

- ☐ I would like to speak
- ☐ I will provide information, if requested
- ☐ Although I do not wish to speak, I am in support

PLEASE PRINT:

Name: _____
Representing: _____
Address: _____

Primary telephone: () _____; Cell: () _____
e-mail address: _____

*Your signature required on the back hereof is certification that your testimony is true and correct and an acknowledgment that you are testifying under oath.



Advocacy Tips


Testifying in Committee

- ▶ Communicate with the bill's author
- ▶ Be concise and to the point
- ▶ Know your audience and their communities
- ▶ Use stories and data



Legislative Process

Floor Notes to Legislators

SERGEANT-AT-ARMS HOUSE OF REPRESENTATIVES	
	
IN THE HOUSE LOBBY	
Seat No _____	
TO _____	
FROM _____	
DATE _____	
TIME _____	
ORGANIZATION _____	
BILL/RESOLUTION # _____	
AUTHOR _____	
SUBJECT _____	
PHONE # _____	
FOR <input type="checkbox"/>	AGAINST <input type="checkbox"/>
MESSAGE:	



Navigating the Session

Legislative Website: www.legis.la.gov

Firefox Louisiana State Legislature
www.legis.la.gov/Legis/Home.aspx

Home Laws Bills Sessions House Senate Committees Legislators My Legis

About the Legislature
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How do I ...? (FAQ's)
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TODAY'S MEETINGS, 1/16/2014

[sort by date/time](#)

Senate Committee Meetings

Judiciary B	10:00 am	Room E	Cancelled
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Joint Committee Meetings

Gaming Control Board	10:00 am	Room 1	Adjourned
State Bond Commission	10:00 am	Room A-B	Adjourned
Louisiana State Police Casino Gaming Section	Upon Adjournment of Gaming Control Board	Room 1	Adjourned

[View Upcoming Meetings](#)

2014 REGULAR SESSION

To convene at noon on Monday, March 10, 2014. Final Adjournment no later than 6:00 pm on Monday, June 2, 2014

2014 Regular Session Information
Bill Search
2014 Regular Session House of Representatives Bulletin
2014 Regular Session Senate Bulletin
Future Session Dates

3:52 PM
1/16/2014

Other Resources

- ▶ Louisiana Budget Project
 - www.labudget.org
- ▶ Alliance for Justice
 - www.afj.org
- ▶ Nonprofit Vote
 - www.nonprofitvote.org
- ▶ National Council of Nonprofits
 - www.councilofnonprofits.org

Q & A