

Public Policy Advocacy Toolkit

Non-profit volunteers, staff and boards are the most effective advocates for public policies that advance their organizations’

missions. Nonprofits can and should inform their elected officials about their work and have the right to lobby for or against legislation within parameters. Non-profits and community foundations that elect the 501 (h) “Expenditure Test” have significant room to advocate for legislation.¹

Below are a few of the most impactful actions nonprofits and their allies can take to promote their policy priorities:



In-Person Visits

It’s easier than you think. Nothing is more effective than meeting in person with elected officials and their staff. It may seem intimidating but calling and scheduling meetings is easy, and the likelihood for booking a meeting with at least staff is very high. Be flexible and friendly.

Be prepared. While scheduling, be prepared to explain the organization, who will attend, and any related policies your group would like to discuss. Board members, high-profile volunteers, organizational leadership, and community members affected by a policy change all make good meeting attendees. Know the elected official’s committee membership, sponsored legislation, and occupation.

What to Bring. To the meeting, bring information on your organization, a concise review of your target “asks” or specific legislation priorities, and data or background information relevant to the elected official’s district or jurisdiction.

Staff is Key. Keep in touch with staff. Following up with further information, especially in line with a staffer’s areas of responsibility, will help your organization develop a positive relationship. Staff often make the recommendations around votes on bills, and are knee-deep in the specifics of the process.

Use Your Home Turf for Relationship Building. While meeting your elected officials in your state capital in the halls of Congress are very important, remember that in-district meetings are valuable as well. In-district meetings are when introductions are made and relationships are built. The elected official will have more time to discuss your organization and share their priorities. During legislative session is when your group should meet to remind elected officials of shared priorities and specific asks and share or receive updates.

Share on Social Media. Use social media to broadcast your meeting; share a picture of the meeting via social media thanking the legislator—don’t forget to tag their official office’s social media accounts (not their campaign accounts).

Give Thanks. Always send thank-you letters to legislators and staff. If possible, have your CEO or Executive Director send a handwritten note.

Share, Ask, Listen, Ask

Meetings are often brief, so you want to keep your points limited and your thoughts organized. One useful strategy is to **Share, Ask, Listen, Ask.**

- 1. Share** about your organization or coalition’s mission and impact, especially related to the elected official’s district. Share a one-pager on your organization’s policy priorities.
- 2. Ask** the staff or legislator about their opinion or priorities related to your issue areas.
- 3. Listen** for key opportunities to connect on policy priorities, or to better understand opposition reasoning.
- 4. Ask** for support, guidance, and/or advice around your policy priority; ask to follow up with the legislator’s staff around the issue, to be viewed as a resource; and if possible ask staff and the elected official to tour your organization in-district or speak to your board or key event.



Letters

Cut Through the Noise. Personalized (non-form) letters that address a specific legislator, a policy issue, and the impacts in the legislator's district are better than form letters.

Power in Numbers. Letters signed by multiple organizations, board members, and local community leaders, or "sign-on letters" are even more impactful, as they demonstrate that stakeholders have mobilized around an issue.

Don't End Up in the Junk Pile. Send hard copies, hand-delivered if possible, and follow that up with an email to the staff or policymakers describing the letter and attaching a PDF of the signed letter.

Don't Forget Staff. Learn the staff responsible for your policy area and send a copy to them, with a personalized note.

Real Stories Matter. If you can include a brief real-life story illustrating the need for your policy change, even better.



Op-Eds

Op-Eds are good message vehicles. Ask your local papers and magazines about their Op-Ed policies and parameters. If possible, find likeminded stakeholders or board members to be co-authors.

Local impact is important. Tell the story about the local impact of a policy, and urge action from representatives on a specific issue or action. Flag upcoming events, like votes or budget decisions. Local twists on state or national hot-topics improve odds of publication.

Timeliness is key. Op-Eds are more likely to be published in the run-up to a relevant event, like a high-profile vote or election or related event in the news.



Provide Testimony

Your organization has valuable expertise. Speaking on your organization's priority issues as they come up before legislative committees is a valuable way to share the expertise of your organization and share on-the-ground experience. Contact the committee's administrative assistant to sign up to testify.



Engagement Opportunities

Recurring events. Invite an engaged elected official to your coalition, public policy group, or board meeting to speak on your organization's policy priorities and give a 'legislative update.'

Host a policy breakfast or panel. Invite your local delegation to a policy discussion around your organization's policy priorities.

Honor and thank your champions. If a legislator takes positive action on your issue, send thank-you letters, and consider honoring the elected official at a board meeting or event.

¹Expenditures of up to around 20% of their budget or \$1 million, whichever is the lesser.
See: www.irs.gov/charities-non-profits/measuring-lobbying-activity-expenditure-test