PUBLIC POLICY ADVOCACY: MEETING WITH ELECTED OFFICIALS
“Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has.”

-Margaret Mead
How Change Happens

“Power concedes nothing without a demand. It never has and it never will.”

-Frederick Douglas
Is it lobbying?

• Direct lobbying =
  – Communication
  – With a legislator (or your members)
  – Expressing a view about specific legislation (or asking your members to be in touch with legislators)

• Grassroots lobbying =
  – Communication
  – With the public
  – Expressing a view about specific legislation
  – Including a call to action
Expressing a view about legislation

• Legislation = a bill or resolution introduced in a legislative body or proposed legislation
• Includes budget appropriations & taxes & attempts to influence the confirmation of judicial & executive branch nominees
• Does NOT include regulations, executive orders, litigation, or enforcement of existing legislation
• Does NOT include calls for adequate funding if there is no budget proposal before the legislature
Measuring Lobbying Activities by Non-Profits

• The 501(h) expenditure test
  – All costs including photocopying, transportation, staff time, overhead costs aimed at lobbying

• The Insubstantial part test
  – No guidance on how much is “substantial”
“Insubstantial part”

- Can lobby as long as the lobbying activities do not become a “substantial part” of its overall activities.
- Subjective test based on circumstances & facts of each case.
- Reimbursements to volunteers for out-of-pocket expenses spent on lobbying counts & must be reported.
“Insubstantial part”

• Factors include:
  – Absolute amount spent
  – Impact
  – Public prominence
  – Unpaid volunteer work
501(h) Expenditure test

- Only counts lobbying activity that costs $
- Limits vary on size of organization budget
  - $500,000 or less = 20%
  - $500,000-$1 million = $100,000 + 15% of budget over $500,000
  - $1-1.5 million = $175,000 + 10% of budget > $1 million
  - $1.5 million + > = $224,000 + 5% of budget > $1.5 million
  - Maximum $1 million/year
- May spend up to ¼ of overall budget on grassroots lobbying
Advocacy that is not lobbying

- Nonpartisan analysis or research
- Communication to members on legislation without a call to action
- Attempts to influence regulations, administrative rules, or executive branch actions (including contact with executive branch or legislators)
- Having a newspaper publish an article or ad stating your organization’s view on legislation without a call to action
- Self-defense activity
Lobbying on your own time

- Staff may engage in lobbying on own time AS LONG AS they do not indicate their relationship to your organization and are not directed by the organization to engage in the lobbying.

- EDs may be considered always on duty unless your Board or personnel policies clarify otherwise.
Prohibited Activities

• Intervening in a political campaign of any candidate for public office (but you MAY encourage & register people to vote)
• Engaging in partisan activity of any kind
• Use of government funds to lobby including to lobby for government grants unless Congress expressly authorizes it (i.e., DDCs)
Funding Lobbying

• May not use *any* government funds to influence legislation
• May not use foundation funds IF grant agreement letter prohibits it
• May use funds generated by fee for service, contributions, membership dues, sale of materials, etc.
Take Away messages

- You CAN & SHOULD engage in public policy advocacy & lobbying
- For most non-profits, you SHOULD do the 501(h) election
- You MUST report lobbying activities with your tax return regardless of whether you elect & no matter how little you spend on lobbying
Reaching Policymakers

- Call * Write * Visit
  - Brief and to the point
  - Stick to one subject
  - Identify yourself
  - How will you & others be affected?
  - Be clear about what you want
  - Be accurate & specific
  - Be polite & positive
  - Offer your help
  - Follow up!
Calling a Legislative office

• Jot down speaking points in advance; if asking for a meeting, know who will be coming with you
• Ask to speak to the legislator or relevant aide
• Note your legislative district
• Give bill # & name or topic
Calling a Legislative office

- Explain why the issue is important to you & the families you serve
- Ask for a meeting
- If not possible, ask for the legislator’s support
- Write notes on your conversation
- Follow up! (In writing!)
SCHEDULING A MEETING

• Be sure to inform the scheduler who will be attending the meeting. Members love to meet with kids!
• If the Member is booked, ask to speak with the appropriate legislative assistant/aide
• You can schedule meetings with the Member and his/her staff when they are in session.
• You can schedule a meeting with the Member on weekends or with their DC staff via conference call
Preparing for Legislative Visits

• Learn as much as you can about the member.
• Establish agenda & goals; prepare content & delivery tailored to the legislator.
• Collect stories from those who can’t attend.
• Bring business cards and information to leave behind.
Preparing for Legislative Visits

• Be prepared, but don’t feel that everyone has to be an expert! You are there to tell your story and the story of other families; those experiences are powerful!
MEETING WITH ELECTED OFFICIALS

• Speak up
• Emphasize key points
• Establish eye contact
• Use visual aids
• Be brief
• Don’t be afraid
• Don’t lie if you don’t know. Offer to find out.
• Be yourself
DURING THE LEGISLATIVE VISIT

• Don’t get intimidated or frustrated.
• Be on time, and don’t stay too long.
• Build a relationship.
• Follow up!
• Remember, it’s all about relationships!
• So, win or lose, keep in touch with those elected officials, administrators, and other policy-makers. Let them know you are still around!
The Last Word

- Empowering families to participate in advocacy for our children, our community, the larger society, is its own victory, regardless of the specific outcome of any particular effort.

- *Democracy is not a spectator sport!* So don’t sit on the sidelines!