



3. Advocacy And Lobbying

Advocacy

In a nutshell, the term advocacy encompasses the actions one takes to effect change for a cause they are invested in. (*Source: Salsa Labs*)

Advocacy seeks to provide information and education to lawmakers, elected officials, other stakeholders, and the general community on the broad social issues/problems addressed by your organizations and the solutions you, and your collaborators provide. For example:

- What needs are the families you serve facing?
- What programs are working well and important for those families?
- What do you seek to change and how?

Lobbying is one example of an advocacy activity. In addition to lobbying, here are examples of other advocacy activities:

- **Host a site visit.** Invite a legislator to visit your organization, to meet your staff, board, volunteers, and clients.
- **Meet with legislators.** Schedule meetings with legislators representing the districts your organization serves and legislators that sit on committee(s) with jurisdiction over your policy issues.
- **Testify.** Attend budget and other hearings and offer testimony. Building relationships with legislators as a reliable source of information and subject matter expert.
- **Build awareness of your cause.** Publish information through social and traditional media about your organization and mission and the broader social issues addressed.

Lobbying

Advocacy becomes lobbying when a position on specific legislation is taken.

For IRS purposes, “legislation” includes:

- Ballot initiatives, bond issues, and referenda
- Bills and other legislative proposals
- Judicial confirmations
- Resolutions
- Does not include administrative rules and regulation

Two Forms of Lobbying

Direct lobbying is communication directly with legislators or their staff, or with executive branch officials participating in the formulation of legislation. In order for a communication to be considered direct lobbying, two elements must be present:

- Refers to specific legislation
- Expresses a position on that legislation

Grassroots lobbying attempts to influence legislation by reaching out to the public and rallying them to support a cause. In order for a communication to be considered grassroots lobbying, three elements must be present:

- Refers to specific legislation
- Expresses a position on that legislation
- A call to action – states that recipient should contact legislator; gives address, email, phone number; supplies a tear off card; or identifies legislators to target

To be considered lobbying by the IRS, both direct lobbying and grassroots lobbying must refer to a specific piece of legislation, express a view or an opinion on it, and, in the case of grassroots lobbying, include a call to action. Thus – if you do not express a position on specific legislation, you are not lobbying.

Here are examples of activities that may be considered to be lobbying (if the above factors are in place):

- **Meet with legislators.** Present a case for why they should support your opinion on legislation. Provide a fact sheet for legislators to review.
- **Write or call legislators.** You, board members, staff, clients, and volunteers, as appropriate, write or call legislators to share an opinion on legislation. Volume matters.
- **Testify at hearings.** Publicly support, oppose, or suggest changes to a bill.

Relationship Building

Nonprofits partner with government to deliver government mandated and other services that ensure the health, safety, and economic vitality of our communities. Building relationships with elected officials year-round, outside “session” and budget season, and during these times, is vital for effective advocacy and lobbying.

In both advocacy and lobbying:

- **Collect and share client stories.** Bring life to you work.
- **Engage those you “serve” in advocacy.** Clients and family members, as appropriate, have the first-hand knowledge and the most accurate and personal understanding of how complex the issues are. Their voices should be at the table.