



### 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.