Do's and Don'ts for Nonprofits in an Election Year

January 31st 2012
Thanks to all of our Co-Sponsors:

9to5, National Association of Working Women
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Center for Law and Social Policy
Child Welfare League of America
Cities For Progress, the Institute for Policy Studies
Community Action Partnership
Council for Opportunity in Education
Disciples Center for Public Witness
Disciples Justice Action Network
Faithful Reform in Health Care
Families USA
Food Research and Action Center
National Alliance to End Sexual Violence
National Association for the Education of Young Children
National Collaboration for Youth
National Council of Jewish Women
National Head Start Association
National Human Services Assembly
National Low Income Housing Coalition
National Priorities Project
National Skills Coalition
NETWORK, A National Catholic Social Justice Lobby
RESULTS: The Power to End Poverty
SparkAction
United for a Fair Economy
United Way Worldwide
YWCA USA
Melissa Boteach

Half in Ten: The Campaign to Cut Poverty in Half in Ten Years

Moderator
Abby Levine
Legal Director, Advocacy Programs
Alliance for Justice
Marylou Beaver
New Hampshire State Director
Every Child Matters
Lobbying and Election-Year Issues for 501(c)(3)s
<table>
<thead>
<tr>
<th>Tax Treatment</th>
<th>501(c)(3)</th>
<th>501(c)(4)</th>
</tr>
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<tbody>
<tr>
<td><strong>Examples</strong></td>
<td>Alliance for Justice</td>
<td>AFJ Action Campaign</td>
</tr>
<tr>
<td></td>
<td>Every Child Matters</td>
<td>PLAN Action Fund</td>
</tr>
<tr>
<td></td>
<td>LCV Education Fund</td>
<td>LCV</td>
</tr>
<tr>
<td><strong>Tax-Exempt</strong></td>
<td>Donations tax-deductible</td>
<td>Tax-Exempt</td>
</tr>
<tr>
<td></td>
<td>Private Foundation grants</td>
<td></td>
</tr>
<tr>
<td><strong>Lobbying Activities</strong></td>
<td>Limited</td>
<td>Unlimited</td>
</tr>
<tr>
<td><strong>Electoral Activities</strong></td>
<td>Cannot support or oppose a candidate for office</td>
<td>Secondary activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Follow federal and state election law</td>
</tr>
</tbody>
</table>
Organizing

Educate Legislators

Get to Know Legislators

Public Education

Nonpartisan Voter Ed.

Organize a Rally

PARTISAN POLITICAL

Lobbying Exceptions

Regulatory Efforts

EDUCATIONAL CONFERENCES

LOBBYING

Get to Know Legislators

Research

Training

Litigation

What is ADVOCACY?
Nonprofits can and should ADVOCATE and LOBBY for POLICY CHANGE!
INSUBSTANTIAL PART TEST

1. Default test
2. What is “insubstantial”?
3. Lobbying not defined
4. Activities-based
5. Penalty

501(H) EXPENDITURE TEST

1. One-time election – IRS Form 5768
2. Dollar-based limits
3. Expenditures only
4. Definition of lobbying
5. Penalty less severe

How much LOBBYING?
### ANNUAL EXPENDITURES

#### OVERALL LOBBYING LIMIT

<table>
<thead>
<tr>
<th>ANNUAL EXPENDITURES</th>
<th>OVERALL LOBBYING LIMIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500,000 or less</td>
<td>20%</td>
</tr>
<tr>
<td>$500,000 to $1 million</td>
<td>$100,000 + 15% of excess over $500,000</td>
</tr>
<tr>
<td>$1 million to $1.5 million</td>
<td>$175,000 + 10% of excess over $1 million</td>
</tr>
<tr>
<td>$1.5 million to $17 million</td>
<td>$225,000 + 5% of excess over $1.5 million</td>
</tr>
<tr>
<td>Over $17 million</td>
<td>$1,000,000</td>
</tr>
</tbody>
</table>

1. Calculate organization’s

2. Overall lobbying limit

3. Grassroots lobbying limit is 25% of overall limit

**“Exempt Purpose Expenditures”**

**LOBBYING LIMITS under 501(h)**
No support or opposition for CANDIDATES running for PUBLIC OFFICE
**NONPARTISAN**

Electoral Activities

**Issue Advocacy**
Advocating for organization’s issues during election year

**Voter Registration**
Registering historically underrepresented groups

**Voter Education**
Educating voters in a nonpartisan way about candidates

**Doing More!**
Ensuring partisan activities are not attributed to the organization
Who's For Kids? And Who's Just Kidding?

85% of American voters agree that our political leaders are not doing enough to help solve the problems facing children today.

A child can't see through campaign promises, but you can.

If government is not about children, then what is it worth?

Make your vote count for kids.

FACTS and CIRCUMSTANCES
Food stamp need increases during periods of high unemployment.
CRITICIZING INCUMBENTS

Focus on Legislative Issues

Continue Ongoing Criticism

Don’t Criticize Personal Characteristics
June 3, 2008

As a candidate for «For_Office» I want you to know that the Oregon Center for Public Policy has a wealth of information that is available to all candidates for public office and encourage you to visit our website and contact our office if you need information about budget, tax or economic issues important to low- and moderate-income Oregonians.

While OCPP is a non-partisan public policy research institute that does not get involved promoting or opposing candidates for elective office, our information on our website and from our staff is available to anyone, including candidates.

If you contact us for information we will try our best to provide you with the timely, credible and accessible information that’s been our hallmark for over a decade.
VOTER REGISTRATION

No Reference to Party/Candidate

No Suggestion of who to Vote for

Make Service Available to EVERYONE

Targeting for NONPARTISAN reason

VOTER REGISTRATION & GOTV
Neither the League of Women Voters Education Fund nor any of its partners takes any position on or expresses any preference about the issues or candidates displayed on this site. The League of Women Voters does not support or oppose candidates or political parties.
QUESTIONS

Unbiased questions

Open-Ended Questions

Distribute to all candidates

Broad range of issues

No Pledges

FORMATTING

No editing

Present responses equally

Disclaimers

**U.S. Senator**

Please describe the training and experience that qualify you for the position of United States Senator. (30 word limit)

Describe the elements you would support or oppose in a national energy policy. (75 word limit)

In light of the Enron, WorldCom, etc. revelations, what approach should the federal government take to ensure the financial integrity of companies operating in the U.S.? (75 word limit)

How would you balance the need to protect American citizens from the terrorists with the need to retain our civil liberties? (75 word limit)

**John Cornyn, REPUBLICAN**

I am running for United States Senate based on my conservative principles and my proven record of accomplishment for the people of Texas as a state Attorney General, former Texas Supreme Court Justice and District Judge.

An imbalance exists between energy supply and demand that could undermine our economy and national security. I support steps to increase domestic supply, conservation and use of alternative clean fuels, and to reduce our dependence on foreign sources. We should provide tax credits for marginal oil and gas wells, and start new exploration in Alaska. We must modernise our infrastructure to ensure that energy supplies can be safely transported to homes and business.

Our capitalist system depends on the honest disclosure of corporate finances so investors can assess a company and act accordingly. I support increased openness and transparency, including more timely disclosure of new corporate board members and stock option grants. I also support prosecuting those responsible for financial abuses to the fullest extent of the law, and efforts to clean up business practices, tighten accounting regulations, and promote other corporate reform proposals.

**Ron Kirk, DEMOCRAT**

My career spans over 20 years of public and corporate service. I worked for Senator Lloyd Bentsen, was chair of Texas’ General Service Commission, and was Texas Secretary of State. As Mayor of Dallas, I brought Democrats, Republicans, and citizens together to cut crime and taxes and attract new investment.

I support a balanced plan that expands our energy supply by providing a diverse energy mix. We must encourage resource and development in new energy technologies that promote the greatest level of conservation at home, in business, and in industry. Through robust support of Federal R&D programs, we can promote the development of cleaner, environmentally sensitive technologies that lead to more efficient uses of hydrocarbons, coal, renewables, and other energy sources without instituting new mandates.

Corporate deceptions and bogus accounting practices have hurt many Texans and drained the retirement nest-eggs of Americans who have fallen victim to these irresponsible actions. These recent corporate scandals have undermined trust in the market. We need to take action to restore public trust and our economic strength, beginning with ensuring the accuracy of financial information and eliminating corporate conflicts of interest. I commend President Bush for enacting legislation to that end.

Our primary responsibility as public servants is to protect the lives of citizens. I think we need to take whatever actions necessary to defend our homeland security. At the same time, especially in a time of crisis, we cannot jeopardise our fundamental values and beliefs. We cannot discriminate against others under the rubric of national security, and we must always remember that we are fighting to preserve our fundamental freedoms.
QUESTIONS

Unbiased questions

Broad range of issues

FORMAT

Invite all Viable Candidates

Fair Rules

Impartial Moderator

Unbiased Audience

Equal Opportunity

No Contextual Favoritism

DEBATES & FORUMS

Wednesday, June 16
7:00 PM

Hunter Conference Center
Meet & Greet following debate

Moderated by Rod Decker of KUTV 2 News
CANDIDATE APPEARANCES

Equal opportunity required

No contextual favoritism

Invite all viable candidates

CANDIDATE Appearances
APPEARANCE UNRELATED TO CANDIDACY

Awards & Policy Updates

No Equal Opportunity Required

Avoid Mentioning Candidacy

Don’t Time to Coincide with Election

Disclaimers and Letters

Appearance UNRELATED to Candidacy
Doing MORE!

Individual Activities

Business Dealings

Post-Election Activities

INDIVIDUAL Activities
Insert poll questions before Q and A
Electoral Activities for Non-Profits
Find Partners
Who shares common issues?

- Children’s Groups
- Senior Groups
- Labor
- Faith Based Groups
- Health Based Orgs.
- Education Orgs.
- College Groups

Think outside of your silos!!
Enlist the Voters and Build your Base
Ways to Reach the Voters

- Tabling at Community Events
- Presentations to Rotary Clubs, Chamber of Commerce and other civic groups
- Lunchtime Presentations at Senior Centers
- Family Suppers at Child Care, Head Start and After School Sites
- Presentations at PTA meetings and other places where parents (voters) meet.
- LTEs and Op Eds
Enlist prominent allies in your state to deliver your message.

Elected Officials, Business Leaders, Members of the Armed Forces......
Provide Training
Media
  - LTEs and OpEds
  - Call in to Radio Shows

Social Networks and E-Mail
  - Blogs
  - Twitter
  - Facebook
  - Newsletter

Web Sites
  - List Issues
  - Post Candidate Responses to Questionnaire
  - Post Candidate Events
Make sure your supporters know the questions to ask the candidates.
Take your message to the candidates.
Visibility
Candidate Forums

• We partnered with the University of NH to hold issue centered single candidate forums.

Join us on Monday, December 12th for a Candidate Forum on Children and Families with Presidential Candidate Fred Karger!

Hosted by Every Child Matters in New Hampshire and the UNH Family Studies Department.

Monday, December 12th
3:30pm
MUB, Room 330-332

Fred Karger will share his views on children’s issues. This is an opportunity to hear a candidate discuss important issues and ask your questions. All are invited.
Invite the candidates to your program.
Create a Candidate Questionnaire

• What changes would you make to the Affordable Care Act and State Children’s Health Insurance Program to guarantee that the 8 million children currently uninsured will receive coverage when the law is slated to be fully implemented in 2014?

• 20,000 children in New Hampshire receive support from the Social Security program, either through payments for disability or survivor benefits when a parent has died. What are your proposals to secure the future finances of this program and how would that impact children who benefit from the program?
Targeted Paid Advertising

RUNNING FOR PRESIDENT?

During tonight’s debate, tell New Hampshire what you will do to help prepare our children and youth to compete in a global economy.

• Millions of America’s children live in poverty, thousands in New Hampshire.
• Millions are reported abused and neglected, thousands in New Hampshire.
• Millions are without health insurance, thousands in New Hampshire.
• Millions are without quality child care, thousands in New Hampshire.

These are not the conditions that produce healthy, well-educated children.

For these problems to be solved, children will need friends in high places, starting with the White House.

TELL NEW HAMPSHIRE HOW YOU WILL HELP.
It’s important, because in America and New Hampshire, every child matters.

www.everychildmatters.org
For More Information Please Contact:

1023 15th Street NW
Washington, DC 20005
202-223-8177
www.everychildmatters.org
15.1% of Americans live in poverty

of Americans,

16.3% lack health insurance

41.5 births to every thousand teenage women

9% young people ages 16-19 are disconnected

37.5% of 25-34 year olds hold an associate's degree or higher

74.7% of high school students graduated in four years

We can all share in America's prosperity.
Click on your state to get a progress report on cutting poverty in half in ten years.

Restoring Shared Prosperity: 2010 Strategies to Cut Poverty and Expand Economic Growth

Take Action!
Tennessee

Download the Tennessee factsheet for more information.

Lowest indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teen Birth Rate per 1000</td>
<td>44th</td>
</tr>
<tr>
<td>Percent without a bank account</td>
<td>42nd</td>
</tr>
<tr>
<td>Poverty Rate</td>
<td>40th</td>
</tr>
</tbody>
</table>

### Cutting Poverty in Half

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2010 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poverty Rate</td>
<td>17.7%</td>
</tr>
<tr>
<td>Food Insecurity Rate</td>
<td>15.0%</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>9.7%</td>
</tr>
</tbody>
</table>

- **Poverty Rate**: Percentage of people in the state who fell below the official poverty line in 2010
- **Food Insecurity Rate**: Percentage of households unable to acquire enough food to meet the needs of all their members at some point during the year
- **Unemployment Rate**: Percentage of unemployed workers in the state during an average month in 2010
The state of poverty and opportunity in Michigan

Nationwide, millions of families facing economic hardship and poverty are doing all they can to make ends meet despite today’s challenging economy. Many of the 103 million Americans living on less than $44,700 a year are struggling to pay their rent, keep current with utility payments, cover the cost of health care, and put food on the table.

In Michigan, families are dealing with these challenges and more on a daily basis. Of the total number of residents in Michigan in 2010, 16.8 percent lived below the official poverty line, 12.5 percent were unemployed.

To reduce poverty in Michigan, we need to pursue a comprehensive strategy that creates good jobs, strengthens families, and promotes economic security. Here’s how Michigan is currently faring in these important categories.

Creating good jobs
California
The hunger bill for California is $19.63 billion
That’s an increase of 47.14 percent since 2007
Of Californians,
15.8 percent are in poverty
15.9 percent of households suffer from
food insecurity
3,238,548 are on food stamps
1,459,460 are receiving WIC
What’s at Stake – by congressional district

**Colorado CD-3**

Rep. Scott Tipton

- Poverty rate: 15.6%
- Population: 706,811
- Occupied Households: 280,715
- People without health insurance: 138,786
- Households with children struggling against hunger: 23.4%
- Households receiving SNAP (food stamps): 28,882
- Households receiving Social Security: 81,731
- People receiving Medicare: 110,636
- People receiving Medicaid: 104,872
- Students in Headstart (estimated): 1,859
- Students receiving Pell Grants: 19,414
### Shaping the conversation: Influential Infographics

<table>
<thead>
<tr>
<th>ONE YEAR of nutrition assistance</th>
<th>ONE WEEK of tax breaks for millionaires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Republican budget proposals for FY 2012 cut the Special Supplemental Nutrition Program for Woman, Infants, and Children, or WIC, by <strong>$833 million</strong></td>
<td>The extension of the Bush tax cuts gave the average millionaire a $139,199 tax break in 2011, or $2,700 per week. One week of these tax breaks = <strong>$866 million</strong></td>
</tr>
</tbody>
</table>
| In 2010, WIC served more than **9.2 million participants** every month including:  
933,000 pregnant women  
2.2 million infants  
4.9 million children | About **321,000** households report incomes of more than $1 million. |

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[Center for American Progress](http://www.americanprogress.org)
Half in Ten Grassroots Toolkit

**Toolkit includes:**

- Event ideas to release the indicators in your community
- Sample Letters to the Editor, Action Alerts and Talking Points
- Sample 501c3 questions to ask at candidate forums
- Tips for collecting personal stories to put a human face on the data
- Tips for participating in events with elected officials, getting media attention, and leveraging social media
- Key resources for new activists on safety net programs 101 and the federal legislative and budgetary processes
Resources after the Webinar

http://www.chn.org/save4all/501c3.html
Thanks!