

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



501(c)(3)

501(c)(4)

Examples

Alliance for Justice
Every Child Matters
LCV Education Fund

AFJ Action Campaign
PLAN Action Fund
LCV

Tax Treatment

Tax-Exempt
Donations tax-deductible
Private Foundation grants

Tax-Exempt

Lobbying Activities

Limited

Unlimited

Electoral Activities

Cannot support or
oppose a candidate
for office

Secondary activity
Follow federal and
state election law



What is **ADVOCACY**?



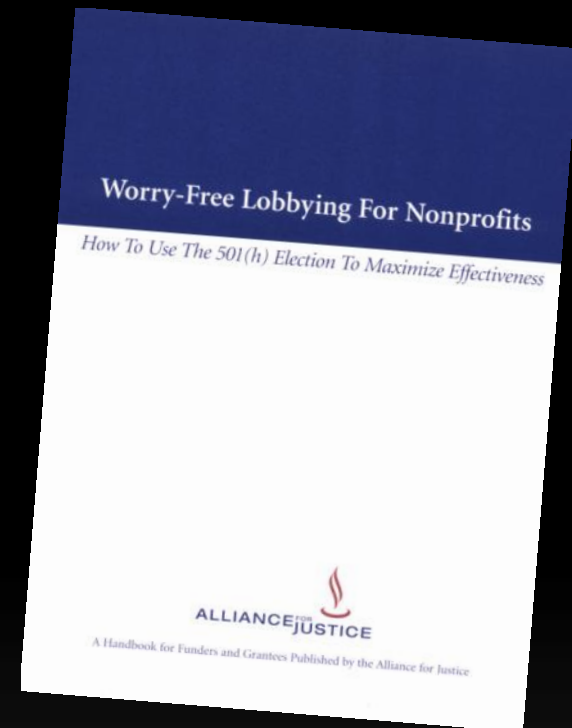
Nonprofits
can and should
ADVOCATE
and **LOBBY**
for
POLICY
CHANGE!

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?

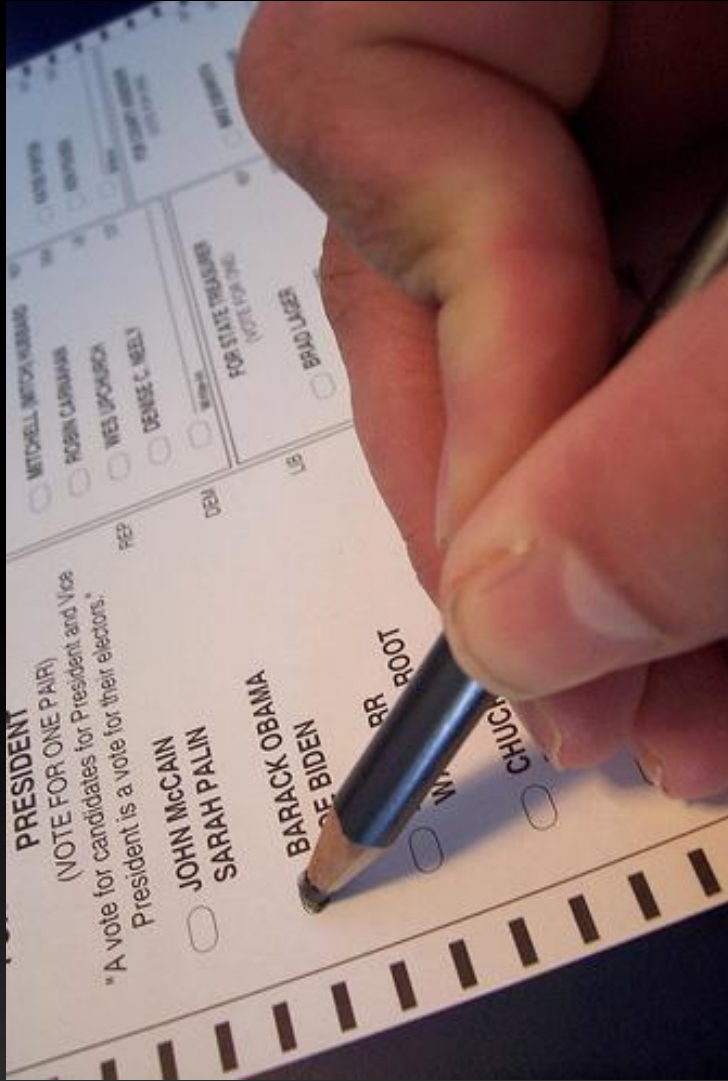
1. Calculate organization's *"Exempt Purpose Expenditures"*

2. Overall lobbying limit

ANNUAL EXPENDITURES	OVERALL LOBBYING LIMIT
\$500,000 or less	20%
\$500,000 to \$1 million	\$100,000 + 15% of excess over \$500,000
\$1 million to \$1.5 million	\$175,000 + 10% of excess over \$1 million
\$1.5 million to \$17 million	\$225,000 + 5% of excess over \$1.5 million
Over \$17 million	\$1,000,000

3. Grassroots lobbying limit is 25% of overall limit

LOBBYING LIMITS under 501(h)



No support or
opposition for
CANDIDATES
running for
PUBLIC OFFICE



facebook

Email

☐ Keep me logged in

[Sign Up](#) Facebook helps you connect and share with the people in your life.



Hillary Clinton 2012

Community

Wall

Hillary Clinton 2012 · Everyone (Top Posts)

Share:  [Post](#)  [Photo](#)

 Like

Issue Advocacy

Advocating for organization's issues during election year

Voter Registration

Registering historically under-represented groups

Voter Education

Educating voters in a nonpartisan way about candidates

Doing More!

Ensuring partisan activities are not attributed to the organization

NONPARTISAN
Electoral Activities



Who's For Kids?

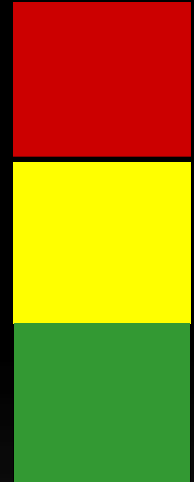
85% of
American
voters
agree that
our political
leaders
are not
doing enough
to help solve
the problems
facing children
today.

And Who's Just Kidding?

*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

ISSUE ADVOCACY

Lobbying/
Advocacy
Campaigns

Criticizing
Incumbents

Legislative
Scorecards

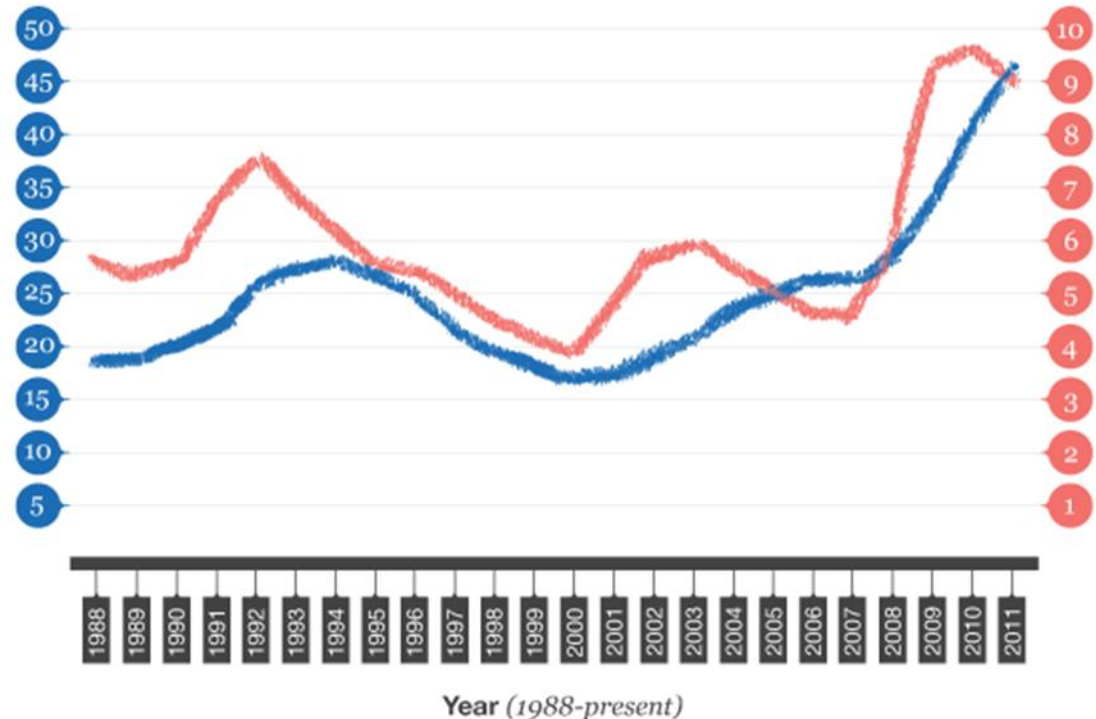
Candidate
Education

Tell Congress: Invest in the future!

Food stamp need increases during periods of high unemployment

Food Stamp Participants
in millions of people

Unemployment Rate
in percent (%)



LOBBYING

or advocacy campaigns

CRITICIZING INCUMBENTS

Focus on
Legislative Issues

Continue Ongoing
Criticism

Don't Criticize
Personal
Characteristics



CRITICIZING

Incumbents

CANDIDATE EDUCATION

Offer to all

Use only what is
already gathered

Only create new
information if
organization has
reason to do so



June 3, 2008

«AddressBlock»

«GreetingLine»

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.

CANDIDATE

Education

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.

DISCLAIMERS

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			
<small>Six-year term. Must be at least 30 years old, a resident of the United States for at least nine years, and a resident of Texas. One of 100 members of the U.S. Senate which has specific powers to advise and consent to presidential appointments and treaties and to try impeachments. Powers the Senate shares with the U.S. House of Representatives include the power to levy taxes, borrow money, regulate interstate commerce, and declare war. Salary: \$145,000.</small>			
Please describe the training and experience that qualify you for the position of United States Senator. (50 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 insure 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 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 cleaner 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 modernize 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 dimmed 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.

QUESTIONNAIRES

QUESTIONS

Unbiased questions

Broad range of
issues

FORMAT

Invite all Viable
Candidates

Fair Rules

Impartial
Moderator

Unbiased Audience

Equal Opportunity

No Contextual
Favoritism

U.S. SENATE DEBATE		
Tim Bridgewater (R)	Sam Granato (D)	Mike Lee (R)
		
Wednesday, June 16 7:00 PM		
Hunter Conference Center Meet & Greet following debate		
		 Moderated by Rod Decker of KUTV 2 News

DEBATES & FORUMS

CANDIDATE APPEARANCES

Equal opportunity
required

No contextual
favoritism

Invite all viable
candidates



CANDIDATE Appearances

APPEARANCE
UNRELATED TO
CANDIDACY

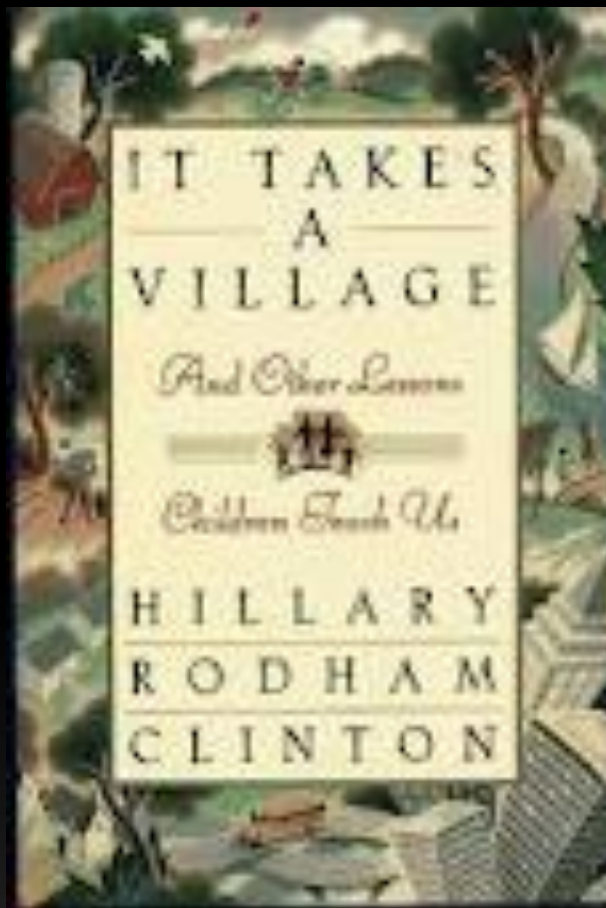
Awards & Policy
Updates

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

WEST COAST

Alliance For Justice
1611 Telegraph Avenue
Suite 1006
Oakland, CA 94612
510-444-6070

EAST COAST

Alliance for Justice
11 Dupont Circle, NW
2nd Floor
Washington, DC 20036
202-822-6070



advocacy@afj.org

866.675.6229

www.afj.org

**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



Communicate



☐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**

QUESTIONS FOR THE CANDIDATES

Children are special. They are not a special interest. But they are powerless. They need supportive families and powerful friends... like the President of the United States. So on behalf of our kids, ask the candidates for the White House these simple questions.

- 1 How do you propose to ensure that America's children grow up healthy and have access to comprehensive health and dental care?
- 2 What are your plans to keep all children in America safe from violence in their homes, schools, and communities?
- 3 What is your position on how to keep children safe and supervised in the late afternoon and early evening hours?
- 4 What is your position on early learning and care, including preparing children for kindergarten?
- 5 What would you do to help families with children in America become economically self-sufficient and able to provide for their family's needs?

EVERY CHILD matters
education fund
www.everychildmatters.org



**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

EVERY CHILD*matters*
education fund
Washington D.C.

For More Information Please Contact:



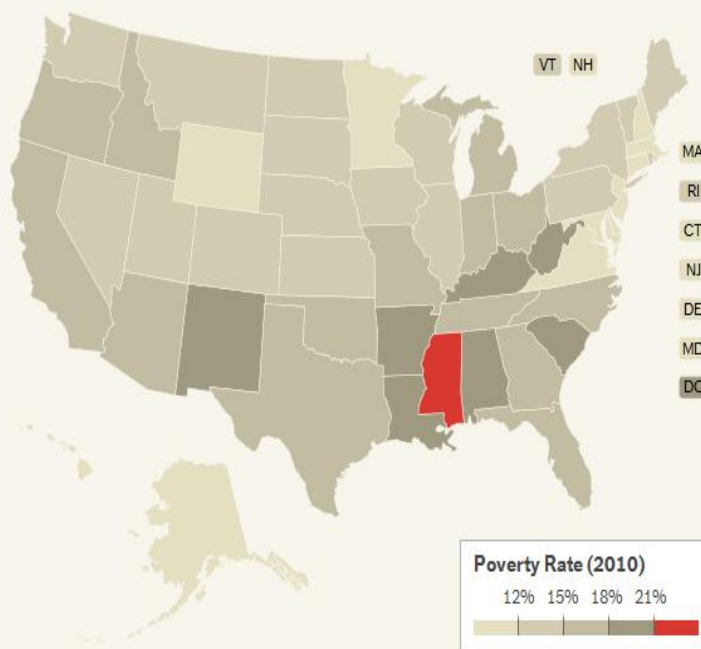
1023 15th Street NW

Washington, DC 20005

202-223-8177

www.everychildmatters.org

15.1%
of Americans live in poverty



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!

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

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

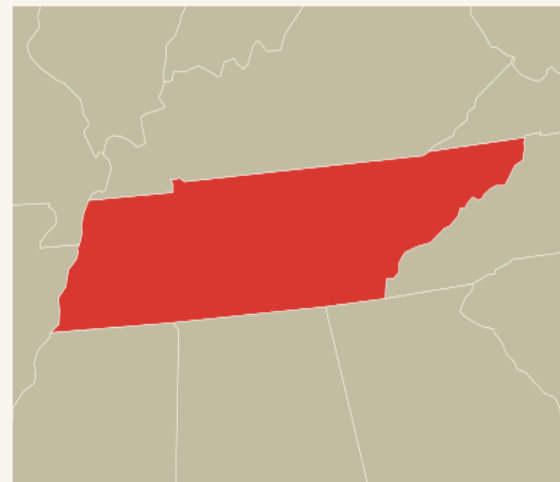
Tennessee



Download the [Tennessee factsheet](#) for more information.

Lowest indicators

Teen Birth Rate per 1000	44th
Percent without a bank account	42nd
Poverty Rate	40th



Rank

CUTTING POVERTY IN HALF

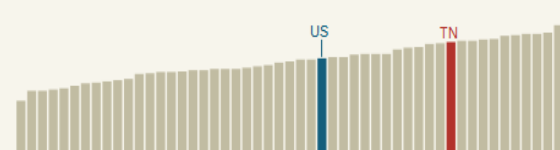
BETTER

WORSE

[Poverty Rate](#)

17.7% 40th

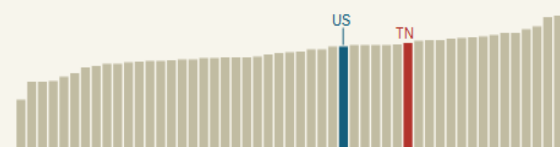
Percentage of people in the state who fell below the official poverty line in 2010



[Food Insecurity Rate](#)

15.0% 36th

Percentage of households unable to acquire enough food to meet the needs of all their members at some point during the year



CREATING GOOD JOBS

BETTER

WORSE

[Unemployment Rate](#)

9.7% 35th

Percentage of unemployed workers in the state during an average month in 2010



The state of poverty and opportunity in **MICHIGAN**

HALF
in TEN **10**

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.

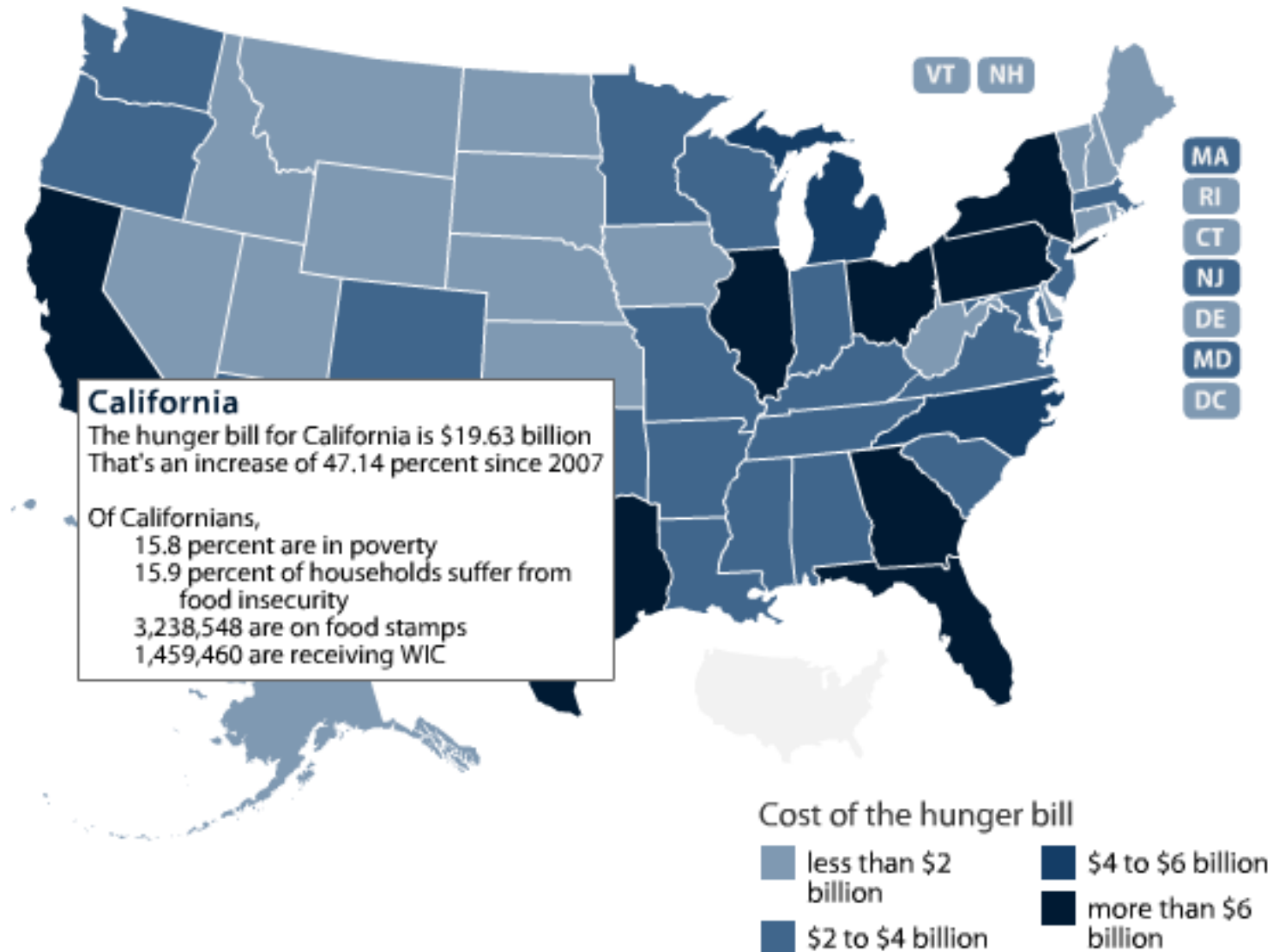
In Michigan, families are dealing with these challenges and more on a daily basis. Of the total number of residents in Michigan in 2010, 16.8 percent lived below the official poverty line, 12.5 percent were unemployed.

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.

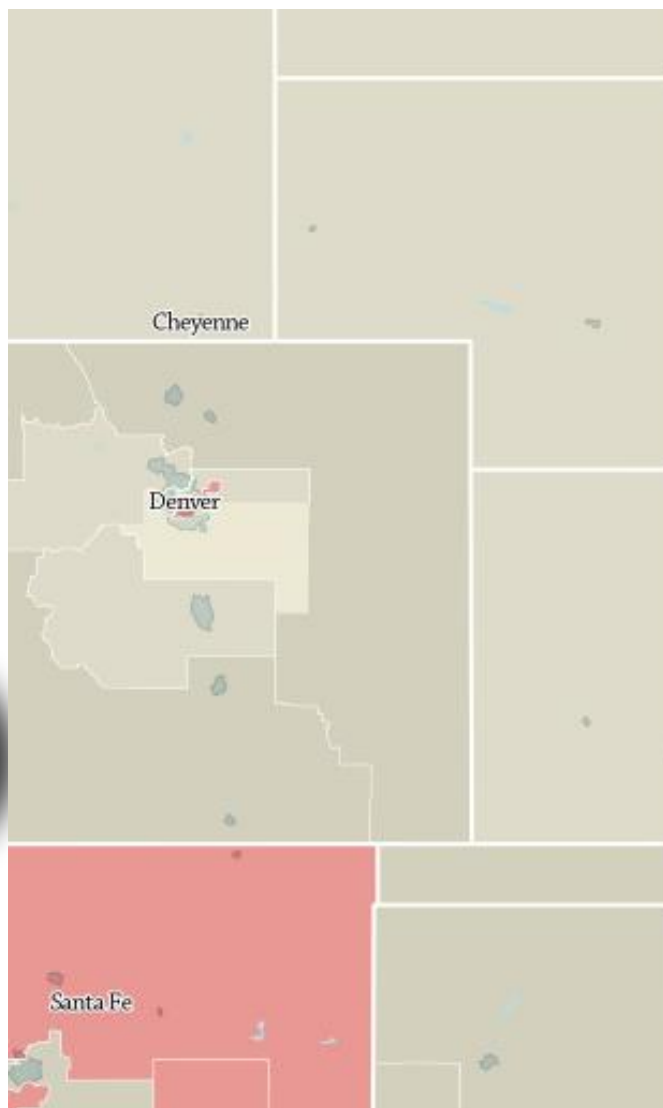
Creating good jobs



Your State's Hunger Bill



What's at Stake – by congressional district

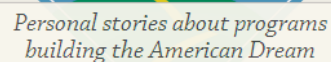


Colorado CD-3

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)	1859
Students receiving Pell Grants	19,414

search



"Head Start is the reason my daughter is alive. The reason my family is intact. The reason I can still smile at my daughter's beautiful face each morning."

-Amanda

In Their Own Words

Concerned citizens on what's at stake in the budget debate

Click on a state for personal stories and key datapoints

Darker colors indicate higher percentage of people living in poverty (2009).

[See all stories](#)

FOCUS ON A TOPIC

All

Education

Child Care

Health

Housing/Utilities

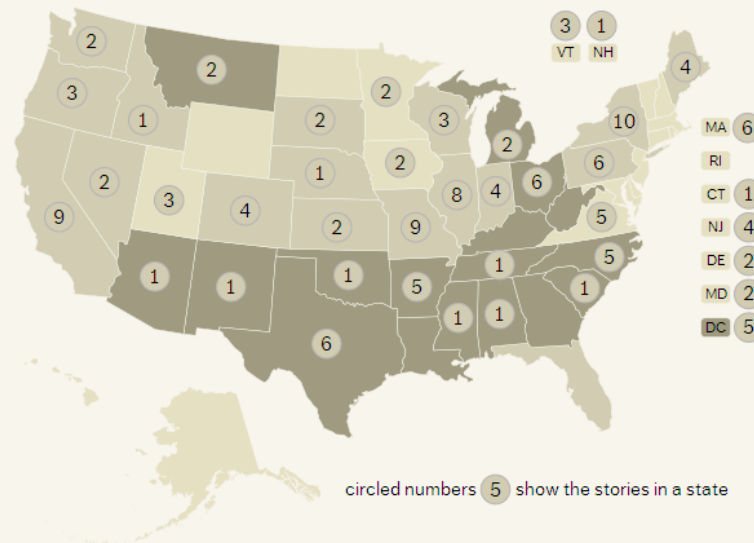
Jobs/Training

Nutrition Assistance

Tax Credits

Income Assistance /

TANF



circled numbers 5 show the stories in a state

MORE GREAT STORIES

[Full list of stories→](#)

Shaping the conversation: Influential Infographics

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

Center for American Progress



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!

