PUBLIC POLICY
ADVOCACY 101 TOOLKIT

WE CAN DO IT! From Community Education to Lobbying with a Capital “L”

Public Policy Advocacy 101 Toolkit created by MizInformation Consulting:
Adapted for use by Community Action of Skagit County and the Washington State Community Action Partnership (WSCAP).

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Please Note: The information contained here is meant to be informational and is not legal advice.
This handout provides general guidelines only, and is intended to serve as an overview. Because the application of law is fact-sensitive and context is critical, it should not be relied upon as legal advice. Organizations should consult with their attorney to receive guidance on special rules governing their conduct.
PARTICIPANT NOTES:

RESOURCES:

**Alliance for Nonprofit Management**: The Alliance for Nonprofit Management is the professional association of individuals and organizations devoted to improving the management and governance capacity of nonprofits to assist nonprofits in fulfilling their mission. [http://www.allianceonline.org/](http://www.allianceonline.org/)

**Bolder Advocacy**: Bolder Advocacy is an initiative of the Alliance for Justice which promotes active engagement in democratic processes and institutions by giving nonprofits and foundations the confidence to advocate effectively and by protecting their right to do so. Their goal is demystify and decode advocacy by equipping organizations with knowledge and tools. [http://bolderadvocacy.org/](http://bolderadvocacy.org/)

**Find your Legislators**: Go to [www.leg.wa.gov](http://www.leg.wa.gov) and click on “Find Your District.” It will tell you which State House and Senate districts you live in, who your Representatives and Senators are, and how to contact them.

**Independent Sector**: Independent Sector advocates for public policies that protect and strengthen the abilities of individuals to support nonprofits and foundations and the ability of these organizations to fulfill their missions. They serve as the unified voice and source of information on the most pressing legislative, regulatory, and economic issues facing the charitable sector. [www.independentsector.org/policy_advocacy](http://www.independentsector.org/policy_advocacy)
## PUBLIC POLICY ADVOCACY 101: Continuum of Advocacy & Who Can Do What

<table>
<thead>
<tr>
<th>Advocacy Activity</th>
<th>Definition/Examples</th>
<th>501(c)(3) Representatives (staff, volunteers, board, etc.)</th>
<th>AmeriCorps &amp; VISTA Members</th>
<th>General Public</th>
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</thead>
<tbody>
<tr>
<td>Community Education</td>
<td></td>
<td>Yes!</td>
<td>Yes!</td>
<td>Yes!</td>
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<tr>
<td>Candidate Education</td>
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<td>Yes!</td>
<td>No!</td>
<td>Yes!</td>
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<tr>
<td>Sponsor Nonpartisan Candidate Debates</td>
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<td>Yes!</td>
<td>No!</td>
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<tr>
<td>Conduct Nonpartisan Get Out the Vote Activities</td>
<td></td>
<td>Yes!</td>
<td>No!</td>
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<td>Endorse Candidates</td>
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<td>No!</td>
<td>No!</td>
<td>Yes!</td>
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<tr>
<td>Make Campaign Contributions</td>
<td></td>
<td>No!</td>
<td>No!</td>
<td>Yes!</td>
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<tr>
<td>Publish/communicate explicitly or implicitly + or - candidate</td>
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<td>No!</td>
<td>Yes!</td>
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<tr>
<td>Legislative Education</td>
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<tr>
<td>Lobbying</td>
<td></td>
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<tr>
<td>- Direct</td>
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<td>- Grassroots</td>
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<td>Administrative Advocacy</td>
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<td>Yes!</td>
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<tr>
<td>Judicial Advocacy</td>
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<td>Yes!</td>
<td>No!</td>
<td>Yes!</td>
</tr>
</tbody>
</table>

**Who Can Do What?**

**NOTE:** 501(c)(3) nonprofit public charity organizations are strictly forbidden from engaging in any political activity in support of or in opposition to any candidate for public office. The IRS will consider all of the facts and circumstances surrounding an activity to determine whether the activity violates this prohibition. However, 501(c)(3) public charity organizations can engage in nonpartisan voter education activity and in a limited amount of lobbying. This handout provides general guidelines only, and is intended to serve as an overview. Because the application of law is fact-sensitive and context is critical, it should not be relied upon as legal advice. Organizations should consult with their attorney to receive guidance on special rules governing their conduct. Some content for this handout was summarized from the Alliance for Justice: [http://www.afj.org/](http://www.afj.org/)
HOW A BILL BECOMES A LAW IN WASHINGTON:

PUBLIC POLICY ADVOCACY ABCs: Preparing for a Meeting with a Legislator

Always be...

Accurate:
- Create talking points from reputable research organizations.
- If you are representing an organization or coalition, get their fact sheets or briefing materials to help you prepare.
- Assign each member of your delegation one main point—it’s easier than everyone remembering everything!
- Support facts with personal experience, but don’t express opinions unrelated to the issue at hand.
- Be prepared to tell your legislator where you got your information.
- Don’t exaggerate. If you’ve got facts on your side, you don’t need to.
- Provide a list of local, state, regional, national and/or international groups that back your bill/issue. Show broad, diverse support.
- Can’t answer a question asked by your legislator? No problem! Just remember this magical phrase: “I don’t know, but I’ll find out.” Then do it. Follow up with an email, phone call or letter after your meeting.

Brief
- When you schedule your meeting, generally ask for no more than 30 minutes.
- Be prepared to make your point in half the time you have been allotted.
- Practice making your point in 15 minutes, 5 minutes and 1 minute.
- Assign one person in your delegation to watch the time and bring the meeting to a conclusion.

Courteous
- Be polite, professional and arrive on time.
- Acknowledge the legislator’s previous support of similar issues or commitment to the community.
- Use the meeting as an opportunity to build a relationship, even if you can’t get to “yes.”
- If you know your legislator opposes your point of view, assume he or she still wants the best for people but needs more education or constituent support to get to “yes.”
- Acknowledge differences of opinion respectfully, then return to the facts and your experience to promote your bill/issue.
### Meeting Agenda Item

#### 1. Introductions:
- Shake hands.
- Note that you live in the legislator’s district, if you do.
- Thanks for past efforts on community’s behalf. Note specific action on bills or on issues important to you.

#### 2A. The ask:
- Assign one person to make a clear, memorable statement that asks the legislator for specific action.
- Include a simple sentence summarizing what the bill does, or the issue you want the legislator to support.

#### 2B. Your main point and personal story:
- Each additional person in the group contributes ONE MAIN factual point that supports the ask.
- Support your point with a personal story about how this issue affects you, your family, or clients. Why do you care about this issue? Why should legislators care about this issue? Use your own words.

#### 2C. Counterpoints to opposition:
- Be prepared to counter misinformation or opposition.
- Don’t reinvent the wheel! Your organization, or a state or national group, probably already has created “talk-back” points. Ask them, or do an Internet search to find them.

#### 3A. Close the deal:
- Once all points have been made and five minutes or less are left in the meeting, wrap things up and thank the legislator for her/his time.

#### 3B. Thanks and follow-up:
- Describe the type of action you will take, i.e. call in a week to confirm support, write a letter to the editor thanking the legislator, etc.
- Leave supporting documents, a copy of the bill, fact sheets, petitions, etc.
- Stand and shake hands.

### Your Message: Lobbying

1A. My name:
1B. My city and legislative district:
1C: Thanks!
1D: Organization(s) I represent:

2A: We are here to ask the legislator vote yes on bill #: ____________
(Other language: Support the issue, or co-sponsor the bill, or influence other legislators to help vote the bill out of committee, etc. If there is no bill introduced, ask the legislator to support a specific issue.)

2B: This issue is important to me because:

2C: Be prepared with talking points for known opposition to your issue.

3A: Will the legislator vote YES on ____________?
(Other language: Support the issue, or co-sponsor the bill, or influence other legislators to help vote the bill out of committee, etc.)

3B: We will follow up by:

### Your Message: Legislative Education

1A. My name:
1B. My city and legislative district:
1C: Thanks!

2A: We are here to get to know the legislator and her/his priorities, and to let you know what’s important to us as constituents.

2B: This issue is important to me because:

2C: Be prepared with talking points for known opposition to your issue.

3A: We hope the legislator understands how low-income constituents are impacted by the issue, and we look forward to providing information and encouragement when the issue comes up.

3B: We will follow up by: