

A GUIDE TO

ADVOCACY IN THE NONPROFIT SECTOR



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A Guide to Advocacy in the Nonprofit Sector is a project of United Way of Greater Chattanooga. This guide is made especially for nonprofits and nonprofit employees in the Greater Chattanooga area. A special thanks to Audrey Lawson in creating this guide.

Disclaimer: The information contained in this guide is for informational purposes only and should not be considered legal advice. If you have questions that pertain to your specific organization, you should seek the advice of a knowledgeable, qualified attorney or consultant. The information and resources provided are not an exhaustive list.



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Introduction to Advocacy

Advocacy is deeply-rooted in nonprofits' beginnings. By developing a mission and setting out to create change- citizens can see the power in numbers to shape public policy. People won't know to rally around your cause unless you tell them about your work and why it is important.

Nonprofit advocacy is any set of actions or activities that raise awareness, draw public support, or get people involved in a cause or policy with the intention of making a difference. Nonprofits take up advocacy campaigns to address the root causes of the issues they stand for by raising money, taking direct action, and informing the public about important issues.

Is advocacy allowed for nonprofits and nonprofit professionals?

- Yes, nonprofit organizations CAN advocate.
- Yes, nonprofit organizations CAN lobby.
- Nonprofit organizations CANNOT participate in activities known as political intervention, including political campaigns and endorsing or opposing any candidate for office.

How to Approach Advocacy

Advocacy is a vast world that might seem overwhelming, but there are small steps you can take to get started and follow through. Some questions to ask yourself are:

- What are the advocacy opportunities in my area or focus area?
- What are our goals and how can advocacy help us meet those goals?
- What are the problems and barriers? What pushback or struggles can you expect?
- Who makes the decisions on our issues and how can we have a more open dialogue?

Then, plan actionable steps you can take

1. Involve staff, stakeholders, or community members that could help your advocacy efforts.
2. Create a timeline to keep you on track. This can include the necessary time to brainstorm and draft a policy memo (see below) or other persuasive tool.
3. Contact policy makers. This is your chance to share your vision and needs with those that can shape relevant policy. Whether it is a one-on-one meeting, email, phone call, or masses of email, follow the steps of a policy memo to get your points across.
4. Follow up with your contact to see if there are plans to act on your recommendations. This may require some patience, but it is important to ensure that your work does not get tossed aside.

More Steps to Consider

If you're a nonprofit board member...

1. Talk with your board chair or CEO about how your board can get more engaged in advocating for your organization's mission. Suggest using this discussion guide as a starting point for that conversation.
2. Ask questions about how the public policy environment could impact your organization programmatic strategy.
3. Seek to understand the organization's business model and how it would be impacted if there were major shifts in federal, state, or local funding as a result of public policy changes.
4. Be willing to tap your networks when doing so. It could support your organization's advocacy efforts.

If you're a nonprofit CEO...

1. Educate yourself about the public policy environment in which your organization operates.
2. Use this guide to start a conversation about advocacy in your boardroom.
3. Embed conversations about the public policy environment (including public/government support you may receive) into your board-level conversations about strategy, funding, and organizational impact.
4. Tap into your board members' networks of influence as a part of your efforts to educate and inform decision makers.

If you're a funder..

1. Eliminate restrictions in your grant agreements that may prohibit or discourage grantees from engaging in advocacy.
2. Invest in organizations that are building their advocacy capacity or are already successfully leveraging advocacy as an organizational strategy.
3. All organizations are impacted by the larger environment and ecosystem in which they operate. Understanding what that ecosystem looks like for your organization and where you are situated within it are critical steps for your board. Ask your board the following questions: what are the societal realities or problems that our work seeks to solve, alleviate, or otherwise address? What are the broader issues associated with our core work? Are our strategies actively addressing those issues? If not, what would change if they did? Changes in your community, funding sources, and public policy environment affect your organization's ability to achieve its mission- for better or for worse.

Specific Advocacy Actions

Campaign Intervention

Nonprofits **cannot** participate in campaign intervention. A charity engages in political campaign intervention when it:

- Makes or solicits contributions to or for candidates or political organizations
- Endorses a candidate or rates the candidates (no matter how objective such rating might be)
- Publishes or distributes partisan campaign literature or written statements
- Has its representatives spoken out about a candidate
- Use its resources to influence an election in favor of a candidate or party.

Nonpartisan Activities

Nonprofits are allowed to conduct nonpartisan activities that educate the public and help them participate in the electoral process. A nonprofit furthers a valid educational purpose when it offers instruction. Such instruction can take various forms, including voter education guides, voter registration and get-out-the-vote drives and candidate forums (Independent, 2018).

This **does not** apply to activities that might implicitly support or oppose a candidate if:

- The statement mentions a candidate for public office
- It expresses approval or disapproval of a candidate's positions or actions
- It is published during a political campaign
- It mentions voting or the election
- It raises an issue on which the candidates disagree



Issue Advocacy

Nonprofits may continue to advocate issues during a political campaign, but must not use advocacy as an excuse for, or to double as, political campaign intervention. The message should not expressly urge a vote for or against a candidate, nor should it even mention a candidate by name. Candidates can be conjured up by substituting party labels or code words for names like, “conservative,” “liberal,” “pro-life,” “pro-choice” or when the message concerns an issue that figures prominently in the campaign and on which the candidates hold opposing views. If the nonprofit has a pattern of substantially similar advocacy during non-election periods, this is another helpful factor that indicates it is not attempting to intervene in any particular election.

Candidate Appearances

Candidates often attend or are invited to speak at ceremonies or functions in a role such as a subject matter expert or public figure. When a candidate appears in a role other than that of candidate or to speak on a topic other than the election, the host nonprofit should make certain that:

- It maintains a nonpartisan atmosphere at the event
- None of its representatives mentions the campaign or the invitee's candidacy
- No campaign activity occurs during the candidate's appearance

Voter Registration Drives and Guides

Nonprofits can engage in voter education by helping people register to vote or help them participate in an election. A nonprofit may conduct a voter registration or a get-out-the vote drive as long as it does so in an unbiased manner. To minimize the chance for bias, the organization and the people conducting the activities should avoid mentioning the candidates or political parties in written or spoken communications about the activity, including publicity, posters, placards, registration materials and handouts. And, any services offered in connection with the activity—voter registration forms, transportation to the polling place—should be offered to all, regardless of their political persuasion.

Voter guides inform the public of the attitudes or actions of their elected representatives or of the candidates for a public office. Such guides can take different forms. Some are compilations of the voting records of political incumbents, including incumbents standing for reelection. These resources are generally allowed.

Tips for Communicating with your Elected Officials

First, familiarize yourself with the legislative process if needed. You can learn more about the process of creating a law, congressional procedures, and more [here](#). A foundational understanding of the policy process is necessary to effectively convey your message. Timing can also be a critical factor. Most matters coming before the legislature are well publicized before and during session, so stay up to date with relevant calendars to align your efforts with voting timelines. Research the policy views and values of individuals before making contact to make more of an impact. Remember, they may get dozens of emails or calls a day, so do not forget to follow up in a timely manner.

Keep track of who you contact, what you said, and the official's responses. This will allow you to follow up more efficiently and plan your future efforts.

Writing a Policy Memo

A policy memo is a document that provides analysis and/or recommendations for a particular audience regarding a particular situation or problem. Policy memos can be used within the community you serve or with elected officials to communicate your needs in an effective manner. This template can also be used to prepare speeches, presentations, emails, make phone calls, and more.

[Your Name and Address]

[Date]

[Recipient Name and Address]

Dear [Stakeholder Group/Name]

First Paragraph: My name is [Your Name] and I'm writing to ask that you [Action].

Establish the relationship. Introduce yourself and how you're related to the recipient. If you are writing to an elected official, include your district and consider adding the name of your organization if you are writing on their behalf. State your what and your why. Try to limit yourself to one specific action to focus the attention on the issues you may find most important.

One distinguishing characteristic of a policy memo is that a summary of the document's conclusion(s) and recommendation(s) is placed right at the beginning of the memo. Remember that the purpose of the document is generally to provide your audience advice about a particular decision, project, or policy stance. Thus, you open the memo by summarizing the problem or situation about which you are writing, and by providing a very brief summary of the conclusions/recommendations you have reached during your analysis. The rest of the memo is designed to support the conclusions or recommendations you present.

Second Paragraph: These are the facts. Support your issue with background information and facts—anything that illustrates the scope of the situation and why it is imperative to act.

The background section provides a broad perspective of the problem/issue at hand. This may take various forms. It may be historical or how the issue has been handled elsewhere. Keeping in mind that different audiences need different amounts of background information.

Third Paragraph: This is how I (or someone I care about) am affected. Personalize the issue and explain how it affects your life. Describe an experience, lived or witnessed, that has led you to this position. If you are writing on behalf of your organization, you can describe the effects on the community you serve and specific examples from your work.

Fourth Paragraph: This is my/our position. Reiterate your ask. You can also suggest smaller, alternative actions that build upon and support your action.

You want to make recommendations that your target audience can actually address. The beautiful thing about policy recommendations is that you can develop ideas based on what has been implemented in other areas. For example, we may look at what other cities are doing to address car thefts and point out their successes.

Fifth Paragraph: "Thank you for your time. I look forward to hearing from you soon." Thank the recipient for reading your letter. Politely ask for a reply, speaking to their views and/or plans moving forward.

Tips for Writing a Policy Memo

- **Understand your audience.** Your letters and emails should vary depending on who your targeted audience is. If your audience is an elected official seeking analysis on a highly technical matter, you should generally assume that the official lacks substantial technical expertise. You will need to define technical terms and provide enough background about the situation you are discussing that such a “lay” audience can grasp your arguments. On the other hand, if you are writing to provide information for your organization base or an expert, it might not be necessary to provide background information that your readers already know.
- **Creating a sense of urgency.** In your policy brief, emphasize why your issue matters and why action needs to be taken immediately. Often, this can be done by emphasizing potential harms if the situation goes unaddressed or potential immediate benefits if your recommendations are implemented as soon as possible.
- **Offering practical suggestions.** The most optimal solution for an issue often requires more resources than your community’s local government likely has available to devote to any one problem. Before writing your policy brief, conduct research into your local government’s budget and available resources. Then, use that information to ensure that the solutions you propose will adequately address your issue while also being practical for your local government to actually implement.
- **Be passionate and concise.** Your ideas will be no more meaningful to the reader of your memo than you are able to make them. The policy audience is busy. You want to be clear and concise. Tightly written policy memos have a much better chance of influencing others toward a particular point of view.

See an example [here](#).

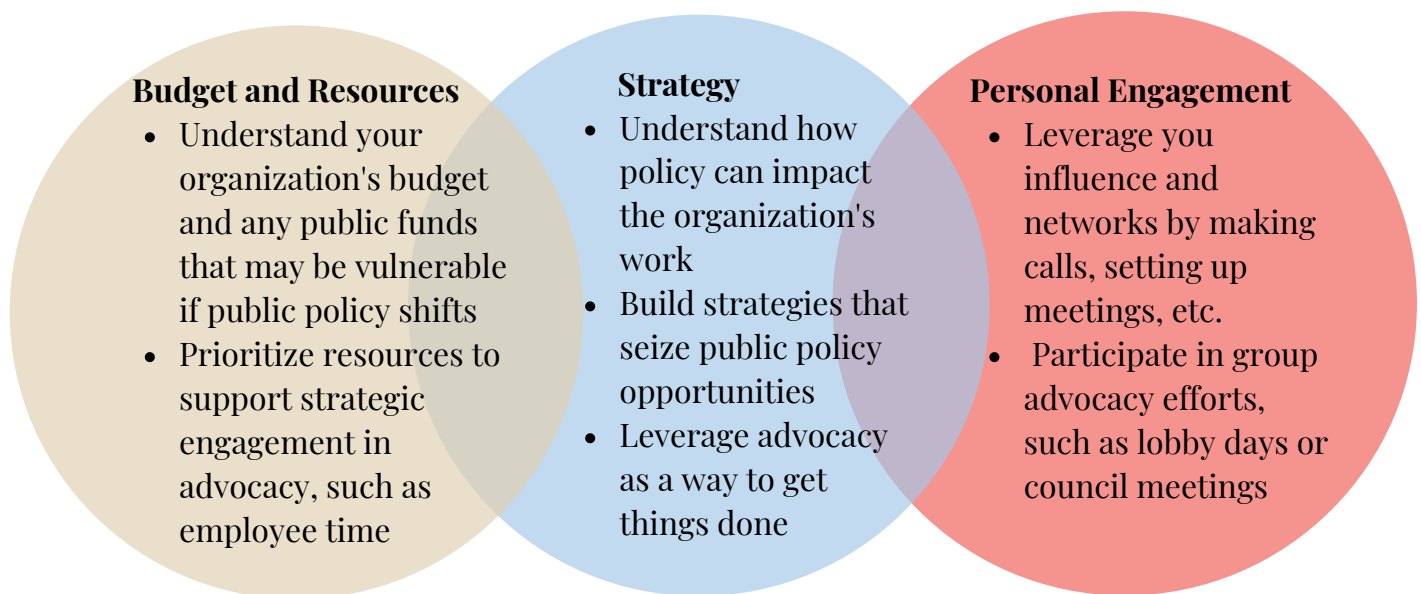
How to Get Your Board on Board with Advocacy

According to the 2017 Leading with Intent report, 43% of chief executives and 42% of board chairs include outreach efforts and acting as ambassadors for the organization as one of the three areas most in need of board improvement. Advocacy is a powerful lever for real impact.

The board is responsible for setting the organization's strategy in partnership with staff (BoardSource). Therefore, the board plays a critical role in determining the role advocacy can and should play in its overall strategy and how best to resource those efforts. If your board doesn't understand how public policy impacts your organization, then the board is setting the organization's strategy without seeing the complete picture and may make decisions that fail to account for the realities facing your organization, your community, or the people you serve.

Every board member brings a combination of passion and connections that, if leveraged, can powerfully accelerate your organization's advocacy strategy.

Methods for Board Members to Advocate



Lobbying

There are many common misconceptions about what 501(c)(3) organizations can and cannot do when it comes to lobbying and political activities. While there is an absolute prohibition against 501(c)(3)s intervening in political campaigns, nonprofits can engage

in lobbying as long as it does not constitute a substantial part of the organization's activities. If a nonprofit engages in any political activity, the organization is at risk of losing its tax-exempt status. However, only if the organization engages in excessive lobbying (meaning, more than an insubstantial part of its activities) does it put itself at risk of having to pay a tax and forfeiting its 501(c)(3) status. Knowing what constitutes lobbying, and what the limits on it are, is the key to lobbying safely. Lobbying is possible and it can be very beneficial to your organization's mission, but it requires careful tracking of the time and money spent on lobbying.

Lobbying can have a vital role in fulfilling a 501(c)(3) organization's mission. High-impact nonprofits not only provide services but also engage in advocacy on behalf of their clients (Independent Sector, 2018). Nonprofits serving vulnerable communities may be the only voice those communities have in policy discussions and the legislative process. Organizations serving a particular community or solving a specific issue intimately know the problems facing that community or the difficulty in addressing that issue and may be in the best position to suggest solutions or educate policy makers. Nonprofits that do not take advantage of their ability to lobby might miss an opportunity to create or affect policies that improve the lives of the people they are serving.

Examples of lobbying are:

- Asking your member of Congress to vote for or against, or amend, introduced legislation.
- Emailing a "call to action" to your supporters urging them to contact their members of Congress to request activity on introduced legislation or pending regulations.
- Preparing materials or organizing events in support of lobbying activities.
- Lobbying is defined as "attempting to influence legislation." Attempting to influence legislation includes contacting or urging the public to contact a legislative body for the purpose of supporting the adoption or rejection of legislation. Legislation includes:
 - Actions by Congress, state legislatures, city councils, or other elected bodies with respect to bills or resolutions
 - Confirmation of an individual for office
 - Ballot initiatives



Advocating Individually as a 501(c)(3) Employee

While 501(c)(3) organizations are required by law to remain nonpartisan in their election activities, it is important to note that this prohibition does not apply to staff members of nonprofits acting in their personal capacity. Nonprofit staff can be involved in political campaigns provided this takes place outside work hours, as long as they are not seen as representing the 501(c)(3) organization (Stay Exempt).



When taking the following precautions and guidelines, there is a great deal nonprofit staff can do for candidates when not representing the organization.

I. Nonprofit staff cannot support political campaigns while at work or by using an organization's computers, supplies, telephones, email, fax or any other equipment or resources for any kind of partisan political activity. When at work or attending functions representing the organization, nonprofit staff should not be wearing t-shirts or buttons supporting or opposing particular candidates or parties nor should there be posters, articles, or other materials in staff members' office spaces that can be perceived as supporting or opposing particular candidates or parties. If staff wishes to engage in partisan activities during work hours, they should take vacation or personal leave.

II. Nonprofit staff involved in partisan political activity should clearly state that they are acting in their personal capacity, and not on behalf of the organization.

III. Take corrective action if the organization is named in association with a political campaign. If the organization is listed on a partisan communication without its permission, it should take immediate action to have its name removed from the communication. Such a withdrawal request should be made in writing and in a timely matter. A copy of the request should be kept on file.

Board members and volunteers are representatives of nonprofit organizations, They are expected to follow the same rules described for staff above. Board members and volunteers are free to engage in partisan activities when they are not working for or representing the organization (Stay Exempt).

City of Chattanooga Council Meetings

All city council meetings are open and accessible online and in person. Meetings are held at the City Council building at 1000 Lindsay St Chattanooga, TN 37402 (enter on Lindsay Street). The agenda can be found in advance [here](#). Public comments are allowed every Tuesday at the end of the 6:00 p.m. meeting. Once the City Attorney reads the rules for addressing the Council, each speaker is allotted three minutes to make comments. A timer will be set and visible to all speakers during this time. Speakers cannot share their three minutes with others. The timer starts anew with each speaker. The Council has limited the public comments section of its agenda to a maximum of one hour.

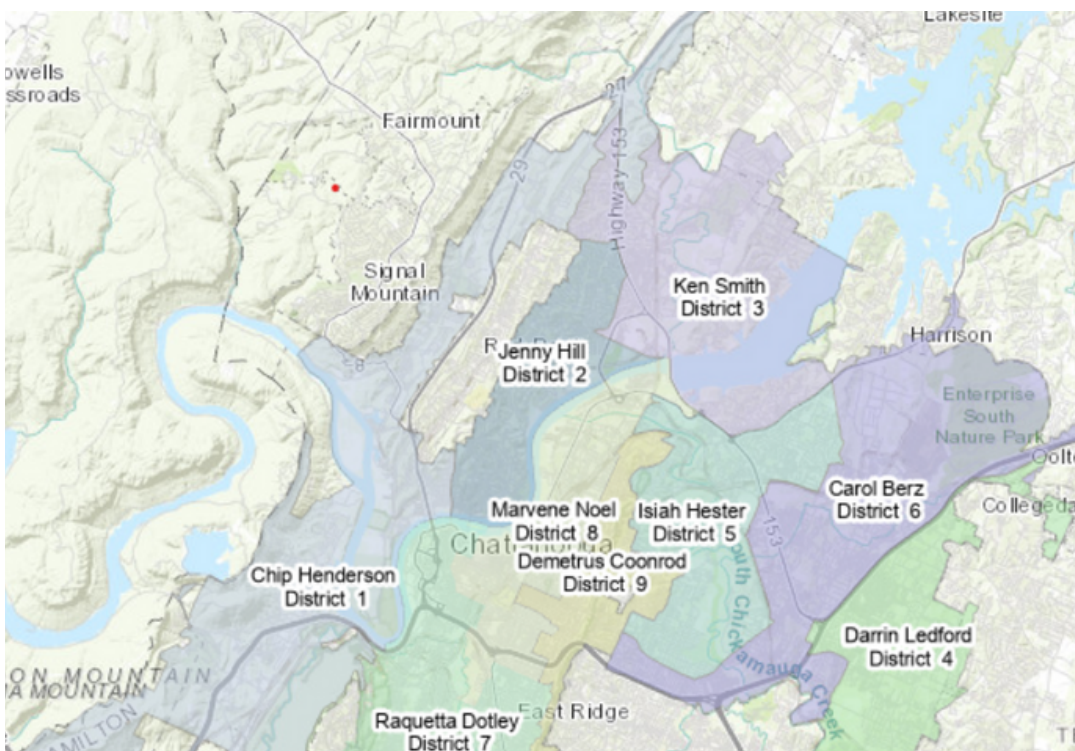
Click [here](#) to view the livestream of the weekly Council meetings, the agenda, and more.

You may email the full council at Council-Clerk@chattanooga.gov or send your comments via mail to the following address:

Chattanooga City Council
c/o Clerk to Council
1000 Lindsay Street
Chattanooga, TN 37402



To leave a voicemail for your district councilperson, dial 423-643-7170 and press the number of your district to leave your message.



Find your
district
[here](#)

Contact Your Government Officials

U.S. Senators: Tennessee

Marsha Blackburn

10 West MLK Street 6th Floor
Chattanooga, TN 37402
Email by submitting [here](#)
423-541-2939
Next election: 2024

Bill Hagerty

Phone: 423-752-5337
Email by submitting [here](#)
900 Georgia Avenue Suite 260
Chattanooga, TN 37402
Next Election: 2026

U.S. House of Representatives: Chattanooga, Tennessee Area

Scott DesJarlais- Representative
District 4
301 Keith St. SW, Suite 212
Cleveland, TN 37311
Email by submitting [here](#)
423-472-7500
Next election in 2024

Charles “Chuck” Fleischmann
District 3
900 Georgia Avenue Suite 126
Chattanooga, TN 37402
Email by submitting [here](#)
423-756-2342
Next election in 2024

Board of Education

Hamilton County School Board

3074 Hickory Valley Road
Chattanooga, TN 37421
hcdeboardmembers@hcde.org
423-498-7038
Next election: 2024

Tennessee State Board of Education

500 James Robertson Parkway
5th floor, Davy Crockett Tower
Nashville, TN 37243
sara.morrison@tn.gov
615-741-2966

Local

Tim Kelly: City of Chattanooga Mayor

101 E. 11th Street
Chattanooga, TN 37402
mayor@chattanooga.gov
(423) 643-7800
Next election in 2024

Weston Wamp: Hamilton County Mayor

625 Georgia Avenue, Chattanooga,
Tennessee 37402
Contact by submitting [here](#)
423-209-6100
Next election in 2026

Tennessee State General Assembly

Find your state legislators

1-800-449-8366

Find your extension here

<https://www.capitol.tn.gov/>

Georgia State General Assembly

Find your state legislators

1-800-436-7442

<https://georgia.gov/>

U.S. Senators: Georgia

Jon Ossoff

3280 Peachtree Rd. NE

Suite 2640

Atlanta, GA 30305

Email by submitting here

470-786-7800

Next election: 2026

Raphael G. Warnock

Sam Nunn Atlanta Federal Center

100 Alabama Street SW, Suite 3R8

Atlanta, GA 30303

Email by submitting here

770-694-7828

Next election: 2026

U.S. House of Representatives:

Georgia

Find your Representative by district here

Georgia Board of Education

205 Jesse Hill Jr. Drive SE

Atlanta, GA 30334

askdoe@gadoe.org

404-656-8000

Resources and Local Advocacy Groups

IRS Stay Exempt Series Watch videos on the requirements of nonprofits to stay exempt, including political activities and more.

Mayor's Women's Council The Mayor's Council for Women is made up of three focus areas that work together to break down the barriers that prevent too many women in our community from living the life they want to live. Empowerment, health, and justice.

National Association for the Advancement of Colored People The home of grassroots activism for civil rights and social justice.

The Differences Between Federal and State Government This site presents the different rights and responsibilities of local, state, and federal governments.

Sources

“Board Member Advocacy – Stand for Your Mission.” BoardSource, 29 Oct. 2021, <https://boardsource.org/research-critical-issues/stand-mission-advocacy/>.

Election Dos and Don'Ts for 501(c)(3) Staff Nonprofit Staff Can Be ...
<https://independentsector.org/wp-content/uploads/2018/07/election-dos-donts-501c3-staff.pdf>.

"Lead with Intent." BoardSource, 2017, <https://leadingwithintent.org/previous-reports/>.

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States in the Senate: Georgia and Tennessee.” U.S. Senate: States in the Senate, 14 Dec. 2021, <https://www.senate.gov/states/GA/intro.htm>.

“Welcome to Stay Exempt.” Stay Exempt, <https://www.stayexempt.irs.gov/>.



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