



## **Learning Lab - Essentials: Powerful Advocacy Transcript**

### **Welcome - Autumn**

Hello, my name is Autumn Lee and I am the Communications Director at the Nonprofit Center of Northeast Florida. Thank you for joining us for this Essentials training. This series is designed to cover fundamental, wide-ranging topics in an accessible manner that allows organizations of all sizes and backgrounds to participate and engage. As a valued member of the Nonprofit Center this series is included in your membership and accessible to you and your organization at no additional cost.

Over the next 30 minutes you will hear from a Nonprofit Center staff expert and learn more about how you can take these learnings back to your organization to help you in the important work you do for our communities. At the top of this page, you will find additional tips and tricks for getting the most out of this session. You will also find any referenced handouts or materials in the “downloads” section directly below this video.

With that, let’s get started!

### **Advocacy Essentials Intro - Issis**

Thank you again for joining us today for our Powerful Advocacy essentials. We are excited to be bringing you this presentation in this virtual, pre-recorded model as well as in our virtual, live format. If you are curious about when the next live session will be taking place, make sure to check out our Programming and Events page.

For today’s session we will be spending our time:

- Defining advocacy. What is allowed? what’s not allowed?
- Discussing the nonprofit sector’s duty to advocate. Why is it a crucial part of the work we do?
- And then we’ll look at some resources and information for developing your organization’s advocacy capacity.



All of the work we do and resources we develop here at the Nonprofit Center are created through the lens of our Stronger Nonprofits Framework. This framework outlines our capacity-building philosophy and defines the core pillars we believe are foundational to an organization's success. Those pillars consist of:

- High-Performing Leadership Teams
- Organizational Learning and Measurement
- Access to Capital
- And the pillar that today's session falls under: External Awareness and Advocacy

For more information on our Stronger Nonprofits Framework please visit our website.

### **Defining Advocacy – Issis**

When thinking about advocacy, it's important to make the distinction between advocacy and lobbying so we can understand the different parameters of what we can and cannot do.

Advocacy is the act of identifying, embracing, speaking out and promoting a specific cause. When we refer to advocacy in general throughout this session we're talking about the process and actions that your organization takes to identify and engage in the causes and issues it stands for.

When referring to lobbying we're talking about the act of trying to influence specific legislation. The Alliance for Justice has a great, brief breakdown which simply states: "While all lobbying is advocacy, not all advocacy is lobbying."

While this is an important distinction, it's also important to note that both of these activities are perfectly *legal* for nonprofits to engage in, but lobbying does have its own parameters.

Those parameters are defined by the IRS as "no substantial part" of your organization's activities can include attempting to influence legislation (lobbying).

When determining if an organization has hit that "substantial part" threshold, the IRS considers a variety of factors, including the time devoted (by both compensated



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and volunteer workers) and the expenditures devoted by the organization to the activity.

If that vagueness makes you nervous, we're going to go over an alternative option in a minute.

I should mention anything that doesn't fall within these limits is considered just to be advocacy and there is *no limit* to how much an organization can engage in general advocacy work.

Another important aspect of advocacy activity restrictions includes that nonprofit organizations cannot participate or intervene in any political campaign in favor or against any candidate for public office.

Now, to be clear, it is totally fine to engage candidates for conversations and forums as long as you are showing no favorable treatment and have given equal access to any of the "viable" candidates. We highly recommend discussing this type of event, meeting, or communication with your board first.

So, if the vagueness of the "no substantial part" guidelines makes you nervous then Election H may be something to consider.

Election H applies an expenditure test which provides a more concrete line in the sand for your lobbying limitations and is based on how much your organization is spending on lobbying activities.

This is a good option for organizations where lobbying is a larger-than-usual portion of the work that you do so you are more at risk of hitting that "substantial part" threshold.

There is no cost to apply for this and you can apply for it at any time.

There are limitations and other regulations for organizations that select it for multiple years in a row so definitely talk to your board and do your research before electing for this.

A little bit more around what's prohibited for an organization in regard to elections:



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- Obviously making or soliciting donations for a candidate or political organization is going to be something that your organization wants to stay away from.
- You'll also want to be careful about other activities that could be seen as an endorsement of a specific candidate, such as a ratings scale.
- Again, you never want to steer near what seems like favorable treatment of a candidate.

A lot of this comes down to that bottom line: Using your resources to influence an election in one specific, intentional direction, whether that is through monetary capital like donations or social capital like endorsements. Your tax-exempt status bars you from influencing the results of an election.

Now there are plenty of activities nonprofits CAN do:

You can advocate for a particular issue as long as doing so furthers your mission. This is an important distinction because it is perfectly legal for you to speak out in favor of a constitutional amendment because they are considered issues and not political.

Influencing regulation is also absolutely legal and something you should at least be aware of if not actively involved in. Since regulatory bodies are not seen as legislative, nonprofits can engage in advocating for better conditions whether for themselves or the communities they serve.

For organizations that are involved in a lot of different issues, we see them often create an issue guide which can be a really great way of informing the public of how these issues affect the communities you serve.

Bottom line is nonprofits can legally, ethically, effectively advance their mission through advocacy AND lobbying.

### **The Nonprofit Sector's Duty to Advocate – The Why – Issis**

Let's jump into the WHY.

To paraphrase Archimedes, "Give me a lever long enough and I alone can move the world."



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High-impact nonprofits use the power of leverage to create change. In physics, leverage is defined as the mechanical advantage gained from using a lever. In business, it means using a proportionately small initial investment to gain a high return.

The concept of leverage captures exactly what high-impact nonprofits do. Like a person lifting a boulder three times their weight with a lever, these nonprofits are able to achieve greater social change than their mere size or structure would suggest.

So, why the nonprofit sector? What makes it not only appropriate for nonprofits to get involved in advocacy but also necessary?

What you see in front of you is a public trust survey the Nonprofit Center did in 2012 where we asked folks in Northeast Florida who they trusted the most to take action on issues. What we saw from the responses is that nonprofit organizations were the most trusted overall to take action — more than churches, individuals, and local government.

With that trust not only comes some power but also a whole lot of responsibility to use that trust that's been invested into us as a sector and leverage it for our missions.

We also know that nonprofits are consistently one of the biggest sources for expertise on societal issues.

We not only have expertise on defining the problems but also in creating solutions. And when the sector is working as it should, those solutions are not just being informed by data but also by the boots-on-the-ground experience that nonprofits gain from working directly with the communities their serving.

The very structure of nonprofit organizations lends itself to being an effective changemaker.

Every aspect of a nonprofit organization is designed to ensure that we operate with the community's best interest in mind.

We don't have the same profit-driven motives that stop us from acting completely altruistically, which is why you see that public trust so high.



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So, when thinking about all of this together— the trust invested into us by our communities, the expertise our work equips us with, and the way in which we operate — what is clear is that we have a major responsibility to use those resources to represent the goodwill of the people. Advocacy represents the obligation that all nonprofits have to their communities and our missions to not only do the work but be vocal about it.

And really, that responsibility and duty within itself is one of the biggest assets to a nonprofit when thinking about the power of a nonprofit's brand.

We know that nonprofits unfortunately do not have the often-unlimited resources For-profit brands have to reach out to people. A brand informed by strong advocacy is the difference that makes them decide to engage, volunteer, or give to your organization.

Advocacy is the tool that we use to shine a light on our missions during a time when there are so many for-profit entities vying for that attention.

And we know that nonprofits could benefit from any resources that help them in communicating the work they do with the general public.

In the same public trust survey, 714 people were surveyed and were asked to list their favorite nonprofit organization.

56% of respondents could not list a specific favorite nonprofit and among the 44% that did, it varied among 140 nonprofits.

You see the difference between the slide around trust where people responded that yeah, sure, they trust nonprofits, but when it gets time for people to get specific about who is doing the work, you see a gap in knowledge.

As a sector we need to increase our understanding of how well we are known and how well we are advocating to the community and not just among ourselves. Are we doing a good enough job of connecting ourselves, our brands, our messaging to the issues so that when people think about taking action, they think about us specifically?

### **Developing Your Advocacy - The How - Issis**



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### Strategy Development:

Going through the process of gaining board consensus through every stage of advocacy (building, activating, refining) is crucial. While it can often be an arduous process, getting your board to not only agree on your advocacy platform but play an active role in developing it is just going to make activating them in the actual implementation that much more successful. It's also important in streamlining protocol and process. Having an agreed-upon policy for how and when you speak out will allow your organization to be that much more effective in using your platform. On this content page you will find a Nonprofit Center advocacy protocol which can act as a helpful starting point for developing this process.

### Assessing the Landscape:

Board members should also be staying engaged with what's happening in the different landscapes. Where are trends that provide risk or opportunity to the organization and our service community? If you have a diverse board you should have access to a lot of different networks and communities that can provide critical insights into this. Make sure there is a way for them to share this with the organization and that board members are aware of this expectation.

### Board Members as Individuals:

If your board has played a role in defining organizational values, beliefs, and advocacy strategy, they will be your biggest brand and advocacy ambassadors.

While part of this process is educating and empowering them with the knowledge to use their voice where appropriate, another important aspect is the incorporation of your brand into their own. On this content page, you'll find a Nonprofit Center Advocacy Checklist, which can help individual board members bring your advocacy work into their own.

### Providing Resources:

They should also be involved in finding and allocating the necessary resources to meet advocacy goals, as well as identifying any risks to current revenue/funding sources if public policy shifts.



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Stand for your Mission is a great resource for engaging your board in advocacy planning and implementation.

This is a great tool for engaging your board in understanding the importance of advocacy for an organization as well as the importance of having the board not only play a role but be leaders in the process.

Stand for Your Mission was developed and is run by the folks at Board Source which is in itself another great resource for anyone looking for practical resources, research, or catalyzing tools for engaging and supporting their boards.

One of the reasons that board members can be such powerful assets in other organizational facets, such as fundraising and board recruitment, is because of their connection to the community and their access to networks. These same values make them integral to an organization's advocacy strategy.

In order to have a successful advocacy strategy you have to be intentional about allocating resources and part of that is including it into your budget.

Developing and implementing a powerful advocacy strategy takes time and resources. Do your sources of revenues have restrictions?

Consistently invest resources into understanding the systems that impact the communities you're serving and your ability to serve them. Doing so will not only help you in improving your service delivery but also ensures that your advocacy platforms are relevant and fully encompass the realities of the communities you serve.

And finally think about your staff capacity. We know that every organization doesn't always have the capacity to have a full-time person solely dedicated to advocacy. But as we've outlined, that doesn't make it any less important. So the goal is to leverage existing capacity to move forward with your advocacy priorities and policy agenda while building out plans and strategy for gaining the full capacity you need. It's often a balancing act of encouraging and including the whole team in advocacy activities while continuing to address and meet existing duties AND knowing that if you're asking your staff to begin to engage in advocacy activities then they may have to stop doing something else so that folks aren't overloaded.



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Hopefully all of you already have an existing feedback loop with your beneficiaries that allows for them to frequently share their insights with you but we know that it can be often hard for organizations to prioritize developing the infrastructure that allows for that feedback to happen authentically and honestly as well as knowing what to do with it once you have it.

The power dynamics between nonprofits and their beneficiaries is an important and interesting aspect to this. Obviously, nonprofits don't have the traditional model that we see between consumers and businesses where the consumer holds the money and thus the power. In philanthropy the money is often coming from another source and so the participants (the consumers) may be less likely to give negative feedback in fear of losing access to those services. We know this power dynamic isn't always the case of course but it's an important aspect to keep in mind when thinking through how we collect feedback from our beneficiaries. Are we doing it in a way where they can be honest without fear?

Investing into beneficiary feedback also creates greater responsiveness and buy-in. If you're not consistently allowing for opportunities for feedback you are opening yourself up to allowing unknown issues to continue to go unchecked and fester.

As I mentioned earlier understanding the external forces that impact your organization and the ecosystem that your organization exists in is a huge part of any advocacy platform. If you are not connected to any networks yet that are keeping you informed about what is happening locally, nationally and globally then you are opening up your organization to the risk of being blindsided by something.

These are a few of the networks that we're connected to, but we're always looking to learn from you all who you're working with so make sure to share those with us. On our website under our Advocacy Center page you can actually find a list of local, state-wide and national coalitions. This can be a great resource for getting started!

Like any other plan and strategy you develop for your organization, your advocacy plan and practices should constantly be revisited and challenged. The way people are taking in and digesting information is constantly changing so you should be examining your own advocacy strategy to ensure it's still effective.



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Also, I know discussing plans and strategies can be overwhelming so don't forget that not having all the answers shouldn't keep you from moving forward. You obviously never want to act recklessly or without thought but you don't have to have a 5-year advocacy plan or answers to everything before engaging in meaningful advocacy.

And as we've seen these past few years, making a plan can sometimes mean nothing when the world is turned upside down. So the best way to create a flexible advocacy platform is by having a board and staff that fully understands your mission, vision, and values. Having this core understanding will enable you to more easily pivot and adjust in times of uncertainty.

So now it's your turn! As we end today's session, I want you to think about the following things:

- What are three action items or next steps that you can take away from today's session?
- If you feel like you need more information or understanding of the advocacy landscape, what are some sources or networks you can get connected to?
- And think about your own advocacy! We've spent today talking about organizational advocacy capacity but think about how these learnings and resources can help you in becoming a stronger advocate and ambassador for your mission.

With that, I want to say thank you so much for joining me today for this Powerful Advocacy Essentials! This is my contact information so please feel free to reach out to me with any questions or comments you have.

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### **Close-out: Autumn**

That was great! Thank you for joining us for this Essentials training. We can't wait to see how you take this knowledge back to your organizations! Be sure to fill out the short survey at the bottom of this page; your feedback is important to us! To learn more about what we do at the Nonprofit Center, follow us on social media — you can find us on Instagram, Facebook, LinkedIn and Twitter. To learn more about

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See you next time!