

# Strategic Advocacy

## Expanding Your Comfort Zone



**national  
collaborative  
for infants  
& toddlers**



**COLLECTIVE  
IMPACT FORUM**



**ALLEN MATTISON  
TRISTER, ROSS, SCHADLER & GOLD, PLLC**

**amattison@tristerross.com  
202-839-4488**



# Tech Tips for Today

- Today's session is being **recorded**. The recording and slides will be sent out within a week.
- We want to hear from you!
  - Share your **Questions** in the **chat**
  - Engage with others in the **chat**
- If you have technical difficulties or need help with anything, please send a direct-message to Andrea Guarnero



# Land Acknowledgement

We would like to acknowledge that this session is hosted on the traditional land of the Ohlone people past and present.

We honor with gratitude the land itself and people of these tribes.

Thank you.



# Participatory Land Acknowledgement

Please let us know the indigenous lands that you are on in the chat!

If you are not sure whose land you are on, and are based in the United States or Canada, you can either:

- Enter your location here: <https://native-land.ca/>
- Or enter your city or zip code here: <https://land.codeforanchorage.org/>



# Next Steps To Strengthen Knowledge, Relationships, and Accountability to Support Indigenous Communities

**First Steps:** Learn about the Indigenous lands you are on and the Indigenous people who are part of your community.

## **Next Steps:**

- **Learn about the current context** that is affecting Indigenous People and Tribes in your community;
- **Build knowledge and relationships** with Indigenous-led organizations, coalitions, and organizing groups;
- **Support** Indigenous-led work and movement-building.

## **Resources to Explore**

**Native Governance Center** ([nativegov.org](http://nativegov.org)) provides multiple resources to help move forward, including, “[Beyond Land Acknowledgement: A Guide](#),” and “[Beyond Land Acknowledgement Explainer Video](#).”



# Today's Organizers and Hosts



**national  
collaborative  
for infants  
& toddlers**



# Session Goal: Boost Your Organization's Advocacy ... *Safely*

## Topics to Cover:

- **Understand Your Role in the Policy-Change Ecosystem**
- **What's Allowable?**
- **Apply Theory to Real-World Situations**



# Section 501(c)(3) Charities May Lobby, But Not With Restricted Grants

- Public charity 501(c)(3)s legally may conduct a limited amount of lobbying.
- Private foundation 501(c)(3)s may not directly pay for lobbying.
  - Many foundations prohibit their grants from being used to lobby.



# 501(c)(3)s Must Proceed with Care in an Election – But Don't Shut Down

- 501(c)(3)s organizations cannot support or oppose political candidates.
- Lots of election-season advocacy is allowed – including educating both voters and candidates.



# Congressional & State Lobbying Reporting Applies, Too.



- **This presentation – and the grant restrictions – involve only the IRS lobbying rules.**
  - Specifically, the section 501(h) rules. Check Form 990, Schedule C to see which your organization uses – and consider switching to these section 501(h) rules if your budget is under \$25 million.
- **Congress and each state have different definitions.**
  - Check LDA and state laws for registration and reporting requirements.

# Policy-Change Ecosystem



- Researchers
- Government Agencies
- Direct Service Providers
- Religious Congregations
- Fraternal Organizations, PTAs, Civic Organizations
- Issue-Focused Groups
- Litigation Clinics
- 501(c)(4) Advocacy Organizations
- PACs

# Policy-Change Ecosystem



- **Researchers**
  - Talk to the advocacy groups: What research would they find most useful?
- **Government Agencies**
  - Talk to the advocacy groups: What data do they need?
- **Direct Service Providers**
  - Would Head Start centers or pediatricians' offices host a legislator visit?
  - Put voter registration information at the front desk?
- **Religious Congregations**
  - Educate the clergy so they'll preach or connect interested congregants.
- **Fraternal Organizations, PTAs, Civic Organizations**
  - Get all the important groups at the table – including strange bedfellows
- **Always think: Grassroots Organizing**

# Two Types of Lobbying



- **Direct Lobbying**
  - Communications directly with lawmakers
- **Grassroots Lobbying**
  - Communications with the public to influence lawmakers

# What is Direct Lobbying?



- Direct Lobbying has Three Elements:
  - A communication directly with legislator or staff
  - On specific legislation
  - That reflects the organization's view on the legislation

MA Food System Retweeted



**James Welch** @Sen\_Jim\_Welch · Mar 1, 2018

Great visit today from advocates for the Healthy Incentives Program. In addition to hearing just how important this program is to Springfield I also got an oregano plant! Time to test my green thumb



# What is Grassroots Lobbying?



- Grassroots Lobbying has Four Elements
  - A communication
    - To the public
    - Includes tweets, advertisements and speeches
  - On specific legislation
  - That reflects the organization's view on the legislation, and
  - **Includes a call to action**

# What is Grassroots Lobbying - Call to Action



**Call to Action** is the key distinction between grassroots and direct lobbying

- Call to action asks the audience to contact their legislator
  - “Call Senator Smith, and tell her to vote yes on ...”



- Identifying audience’s legislative representative
- Providing legislator’s contact information
- Identifying legislator as neutral or opposed to your position on a bill
- Providing vehicle for contacting the legislator (form email, petition, etc.)

## Baltimore City Council should pass bill banning sugary drinks from kids' menus

By Kevin A. Slayton Sr.  
Feb 25, 2018

As a pastor in East Baltimore, I see my community suffering from improper nutrition on a regular basis. Poor eating and drinking habits contribute to chronic diseases as the children, adults and grandparents from generation to generation.

Choosing healthy beverages is a huge problem for the children of Baltimore. One in three kids in this city drinks at least one soda every day. The American Heart Association reports that children over the age of 2 drink only one 8-ounce sugar-sweetened drink a week.

The disparity is resulting in children developing chronic diseases that you normally don't see in other parts of the country. One in three Baltimore children is unable to maintain a healthy weight, and research shows that sugary drinks are a key contributor. Chronic diseases such as heart disease, type 2 diabetes and tooth decay are increasingly common among our city's kids.

This is an especially alarming problem in our low-income neighborhoods, where children consume two and a half more sugary drinks than higher-income families. In combination with other factors, we are fighting a lack of awareness about healthy eating and drinking and the marketing of fast-food industries that are bombarding families with cheap, innutritious, sugar-laden drink options for their kids.

Our city has a chance to help its children learn how to make nutritious choices. **On Feb. 27, the Baltimore City Council is expected to vote on the Healthy Kids' Meal Bill** that would require water, milk, 100 percent fruit juice and other healthy drinks the default beverage on kids' menus at city restaurants. The legislation is backed by Sugar Free Kids Maryland, the City Health Department and the American Heart Association — groups that have national standards for creating a culture of health.

**The City Council has an opportunity to play a meaningful role in supporting parents' desire to ensure a healthy start to life for Baltimore's children. This legislation is good policy, and it's the right idea for Baltimore.** By making healthy options easier for families to choose in restaurants, kids will be more likely to choose better drinks like milk and water. When we create a community that supports these kinds of choices, we will be able to see dramatic drops in chronic disease. It will not only help our children become healthier now, but also help them develop habits that reinforce a lifetime of good health.

My congregation has seized its own opportunity to take the lead in promoting healthy food and drinks. We run a soup kitchen every Saturday and invite anyone in the neighborhood who could use a meal. Recently, we've substituted healthier items in the lunches we serve. We also have made changes to serve healthier drinks and more fresh fruits and vegetables, instead of starches and processed foods. As a community institution, our church wants to emphasize the importance of eating and drinking nutritionally. Since we have increased healthier options, even more families have started coming to our soup kitchens.

**Baltimore must seize this opportunity to build a healthy city, healthy habits and healthy children. When we support our children's health, we support the health of everyone in the city, whether they live in low- or high-income communities. Passing the Baltimore City Healthy Kids' Meal Bill would make a tangible difference for all our children's future. It's the right thing to do.**

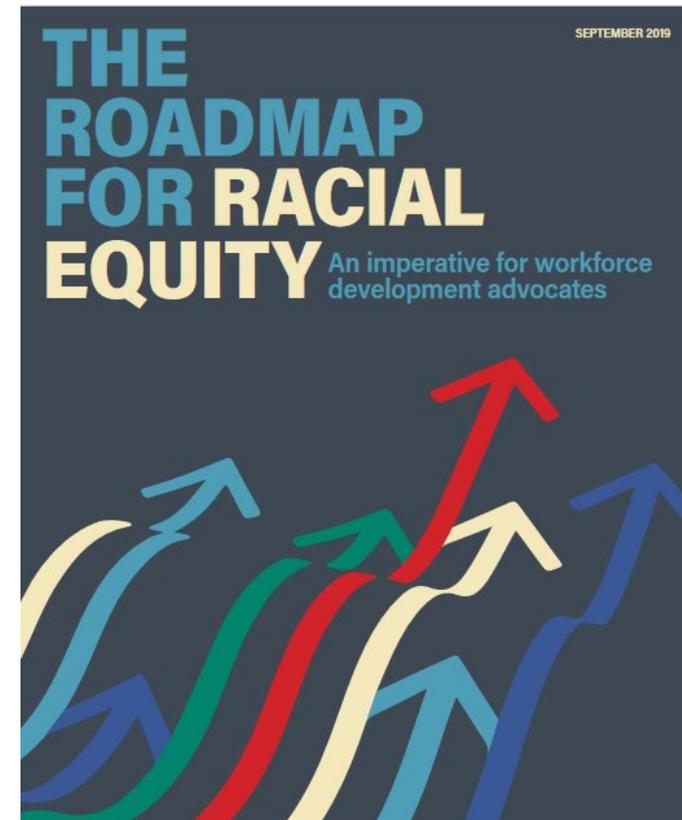
*Kevin A. Slayton Sr. is pastor of the New Waverly United Methodist Church.*

# What is *not* lobbying?



## Leverage the “Subsequent Use” Rule

- A non-lobbying communication that is *first* distributed broadly to the public may *later* be used as part of a lobbying effort.
- Reports, factsheets, op-eds that mention legislation but with no IRS “call to action.”



# What is *not* lobbying?



## Technical Advice or Assistance

- Oral or written assistance provided in response to a written request by a governmental body, legislative committee or subcommittee

# What is *not* lobbying?



## Technical Advice or Assistance

- Request must be made in the name of the entity, not just from an individual member
  - E.g., Committee chair asking on behalf of the committee

**D. Scott Dibble**  
State Senator  
District 61  
Minneapolis - South, Southwest & Downtown

111 State Capitol  
75 Rev. Dr. Martin Luther King, Jr. Blvd  
Saint Paul, MN 55155-1606

January 27, 2014

Rachel Callanan  
Regional Vice President of Advocacy, Minnesota & Wisconsin  
American Heart Association  
4701 West 77<sup>th</sup> Street  
Minneapolis, MN 55435

Dear Ms. Callanan,

On behalf of the Transportation and Public Safety Division of the Minnesota Senate Finance Committee, I request that you provide our committee with information regarding mechanisms other states have used for funding active transportation options. Based on your expertise in this area, and the



**Senate**

State of Minnesota

# What is *not* lobbying?



## Technical Advice or Assistance

- Advice must be available to all members of the requesting entity



- May advocate a viewpoint, if the request specifically asks for opinions or recommendations







## Expand Access to

### **An Act Expanding Affordable Coverage**

#### Lead Sponsors:

#### Why is legislation needed?

For many people in Massachusetts (MA) who do not have health care, health care costs can be a significant struggle. People who do have health care through ConnectorCare, the state's subsidized health care program, face deductibles and co-pays that squeeze their budgets.

- Despite high levels of coverage in 2023, health care costs in this past year.
- Massachusetts' consumer costs – including deductibles and co-pays – have increased year after year, growing **twice as fast** as the national average.

#### Why is this a health equity issue?

- Health care affordability is fundamentally a health equity issue. In MA, **75%** of Black adults and 68% of Hispanic/Latino adults face affordability challenges, such as rationing a prescription or being uninsured due to cost, compared with only 46% of white adults.
- Racial disparities in affording care are most significant among middle-income residents above 300% of the federal poverty level (FPL), with Hispanic/Latinx residents one and a half times as likely to **report** unmet health care needs due to cost as white residents.

#### What does this legislation do?

- **ConnectorCare expansion pilot program:** Expands ConnectorCare for five years to give more MA families access to coverage with lower premiums, copays and deductibles.
  - The ConnectorCare program would be expanded for five years to cover residents between 300% and 500% FPL, so they have access to plans with lower premiums and out-of-pocket costs, similar to current ConnectorCare plans.
  - The costs of the program would be covered by using state savings from recently enhanced federal subsidies, leveraging them for their intended purpose – to make health care more affordable for more residents.

**For more information, please contact Health Care For All:**  
Alex Sheff [asheff@hcfama.org](mailto:asheff@hcfama.org) or Ashley Blackburn [ablackburn@hcfama.org](mailto:ablackburn@hcfama.org)



**NAACP**



National  
Medical  
Association

**BIG TOBACCO HAS NO PROBLEM  
TARGETING AFRICAN AMERICAN COMMUNITIES.  
BUT CONGRESS SHOULD HAVE A PROBLEM WITH IT.**

**Congress: End the sale of all flavored tobacco products,  
including menthol cigarettes and flavored e-cigarettes.  
Support H.R. 2339 to protect our kids.**

PAID FOR BY TOBACCO-FREE KIDS ACTION FUND



# North Carolina is changing.

Most of us are struggling to make ends meet.  
To truly transform NC, we need:

- ☒ Economic opportunity through good jobs
- ☒ Clean air for healthy communities
- ☒ Affordable access to clean energy

Your vote is your voice at the ballot box.  
Refuse to stay **silent** on November 6.

**CHANGE BEGINS WITH ME.**

I PLEDGE TO VOTE BECAUSE  
I'M STANDING UP FOR \_\_\_\_\_.



I PLEDGE TO

**VOTE**

TUESDAY, NOVEMBER 6TH.

**[Click Here](#) to read responses from Candidates for Mayor of the City of Tucson**

*[Para leer las respuestas en español, hacer clic aquí.](#)*



Ed Ackerley, Independent



Randi Dorman, Democrat



Steve Farley, Democrat



Regina Romero, Democrat

---

**[Click Here](#) to read responses from Ward 1 Candidates for City Council**

*[Para leer las respuestas en español, hacer clic aquí.](#)*



Rob Elias, Democrat



Sami Hamed, Democrat



Miguel Ortega, Democrat



Lane Santa Cruz, Democrat

# Candidate Guide to *Think Babies*



Want to build a better future? It begins with babies.

The science is clear. Our brains grow faster between the ages of 0-3 than any later point in life. When babies have nurturing relationships with parents and caregivers, enriching early learning experiences, and strong physical health and nutrition, they have a crucial foundation for healthy development. But when babies don't get what their growing brains need to thrive, they face life-long developmental, educational, social, and health challenges.

**Working families need quality, affordable child care options now.**

**Good child care policy solutions will:**

- Be properly funded and ensure that every eligible family can enroll their child in a high-quality program;
- Provide enhanced federal, financial support for services for infants and toddlers to focus on improving quality and access; and
- Guarantee that child care providers can be paid a living wage.



thanks

## SENATOR GREG REED

for helping make Alabama a healthier place to live  
for children and families through your support of  
Alabama's Healthy Food Financing Act.

Your leadership and commitment to the well-being of  
Alabama's children continues to move our state  
forward on key issues like healthy food access.



Alabama's Healthy Food Financing Initiative will be a vital resource for increasing healthy food access, improving public health, creating local jobs, and spurring economic development and neighborhood revitalization in communities across the state.

For more information on how you can support the efforts to improve healthy food access in your community, visit our website at [alavoices.org](http://alavoices.org).

VOICES for Alabama's Children  
P.O. Box 4576 • Montgomery, AL 36103-4576  
334-213-2410 • [www.alavoices.org](http://www.alavoices.org)



# Personal Activity



- Your free time is yours – do what you want.
- Don't use organizational resources.
  - Email address, donor lists, copy machine.

