



ADVOCACY GUIDE

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*Presented by the Florida Coalition for the Homeless
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ADVOCACY TIPS

You are **an advocate**. You do not have to be an expert on housing or social service policy to advocate, on behalf of people who are homeless or at-risk of becoming homeless, with your legislators.

There's a difference between lobbying and advocacy. Lobbyists make it hard for elected officials to say "No." **Advocates make it easy for them to say "Yes."** Advocates do not need to be partisan; do not require a PAC, and never resort to threats or retribution to be effective.

Advocacy requires the art of compromise...never expect it all. While we strive for unanimity, we work for majority. There's a difference between compromising principles (a no-no) and a healthy policy discussion. Long-term relationships require an understanding of where everyone is coming from before you know where you're going. Burned bridges are impossible to cross, and antagonistic scars may never heal.

Consider your meeting an investment that will pay off in the future for your community.

Remember:

You are the Hometown Connection.

- Your Senators, Representatives and their staff are usually very attentive to the concerns of their constituents.
- Your hometown connection is essential to help elected officials listen with both ears.
- Share/demonstrate how the issue(s) impacts your (their) community. This is what elected officials are most interested in knowing.
- You set the stage with your elected officials through your hometown connection and pave the way for your allied advocates in the Capitol.
 - Trust that your "every day professional advocates" know the details.

Say "thank you" before you say "please."

- Even if you disagree with your elected official's positions on some (or even most) issues, they are more likely to listen to you if you've found some way to praise them.
- Thank him/her for their time.
- If nothing else, thank them for the courage to be a public office holder.

Be concise and to the point.

- The key to influence is not volume, but precision.
- Be brief and keep it simple
- Be clear by using layman's language.
- Identify the bill number (if available).
- Elected officials are not experts, but don't want to be overwhelmed with your knowledge.
 - Let your written material provide most of the stats and figures. Leave them with the elected official to review/reference later
 - Concentrate on principles of policy, rather than too many specifics which may change by the hour.
- Have them trust you as someone to turn to for more details if they are needed.

Other Do's

- Be Polite
- Don't hesitate to communicate with staff – they have the ear of the elected official.
- Ask for (do not demand) an answer regarding support of a bill/issue.
- Hand out your business cards like candy at Halloween.
- Ask for business cards from others and send them an acknowledgement note or e-mail within a day or two of the meeting.

Don'ts

- Be rude.
- Demand anything.
- Threaten or be unreasonable.
- Exaggerate or be deceptive.
- Hint at thoughts of dishonesty.
- Demand an instant answer.

Make the Most of Your Advocacy Meetings

BEFORE YOUR MEETING(S)

- Make an appointment.
 - Prior to Legislative Day, contact your local Florida House and Senate members for the Counties your Coalition/Organization is responsible for/providing services to make appointments on a specific date.
 - Ask to meet with either the lawmaker or the staff person working on housing/homeless issues. The scheduler may also be able to assist.
 - Tell the person who sets up your appointment:
 - 1) where you are from and what organization you represent;
 - 2) the purpose of the meeting; and
 - 3) the number of persons who will be attending the meeting.

If you do not know who your Representative or Senator is, visit:

www.myfloridahouse.gov and www.flsenate.gov

It is recommended you visit all the Representatives/Senators who have all or part of your County in their district.

- Confirm appointment.
 - Write a short thank you note (or send an email) to the staff person to confirm the meeting date, time, and purpose.
 - Call the legislator's office the day before your meeting to confirm the appointment.
- Learn about your legislator's
 - voting record on housing/homeless policy issues.
 - If the record is favorable, be sure to acknowledge his/her past support. Too often, we forget to thank those who do the most for us.
 - If the record is unfavorable, remember that today's opponent may be tomorrow's ally.
 - In politics, a friend is a politician who helps you when you need help – whether Democrat or Republican, Liberal or Conservative – even if that politician is hostile to your interests most of the time.
 - professional interests and personal concerns, including congressional committee assignments, memberships, and affiliations. This may help you build bridges.

- Plan the meeting carefully.
 - Think about what you want to say, and how to frame your message positively. Ensure you include personal stories/examples of how this issue will impact your community (their district).
 - As a general rule, do not bring up more than 2-3 items. You have a greater chance of having a successful meeting if you set the agenda and stick to it.
 - If you do not focus the discussion, the representative will.
- Review the statewide Legislative Agenda and Issues Briefs to prepare for your visits.

ON LEGISLATIVE DAY / MEETING DAY

- Ensure you have enough copies of the Briefs and Booklet to leave with your legislator or their staff as a reminder of your requests.
- Even if you haven't made an appointment, your legislator and/or their staff are still happy to meet with you when you stop by.
- When you get to their office, have your business card ready to hand to the receptionist or legislative aide, and let him/her know:
 - Who you are,
 - Where you are from,
 - What organization you represent, and
 - Why you want to meet.
- Ask to meet with your legislator. If he/she is not available, ask to meet with his/her key staff person working on housing policy.
- If you have made an appointment, BE ON TIME!
- Use any waiting time to discreetly review your meeting plan.

DURING YOUR MEETING(S)

- Open the meeting by introducing yourself and the topic.
- Thank them for taking the time to meet with you.
- Give the legislator/staff person the printed informational material for them to refer to during your meeting.
- Be as brief as possible – most visits will last between 5 and 15 minutes. (The issue or program you advocate should to be compressed into a paragraph and a two-minute presentation).

- State your views clearly. Make the case for this issue by **telling a real life story and personal experiences from your community** (their district) including:
 - Good examples of successful programs (extremely low-income housing, permanent supportive housing, Housing First, prevention, etc...) in your community and about how their help could assist such examples.
 - The unmet needs in your community and how your legislator's support of legislation will help met those needs.
 - Invite legislators and their staffs to visit local housing developments when they are back in their districts. (In asking for a site visit, you may want to request that you speak with the scheduler after your meeting in order to pin down a definite time.
- Suggest/ask (but do not demand) that he/she do something specific on the issue, such as supporting, sponsoring, cosponsoring, or opposing a bill (see printed support material).
- Be honest.
 - Answer the Legislator's/Staffer's questions.
 - If you are asked a question and you do not know the answer, tell the legislator or staff person that you will find out the answer and get back to him/her soon.
 - This provides an excellent opportunity to follow up conversations with the Legislator/Staff person.
- Listen. Do not do all the talking.
 - Your legislator might have legitimate concerns about the issue that your group should address. If they do, note them on the Advocacy Visit report for follow-up.
- Keep the door open for further discussion. Even if your legislator seems to be leaning against your position, do not write him/her off.
- Do not scapegoat other programs to make your point.
- If the legislator or staffer suggests that you engage in a discussion about another program, do not get off point. Come back to your agenda.
- Take Notes using the Advocacy Visit Report Form.
 - What was said
 - Questions raised
 - Commitments by the legislator or staffer

BEFORE YOUR MEETING ENDS

- Ask your legislator and get them to commit to assist you in ending homelessness in your community!
- Summarize the meeting, repeat commitments made by the Legislator/Staffer, and tell the Legislator/Staffer when you will follow up.
- Get a response to your request or an expected timeline for the response.

For example:

You: "So, Staffer Jane, will you ask your boss to support a specific legislative advocacy issue # 1,2,3 4, etc. by co-sponsoring and/or voting for HB/SB XXX

Staffer Jane: "Yes I will ask and get back to you."

You: "Great, I will call you in a week to find out the answer."

AFTER YOUR MEETING(S)

- Report back to the Advocacy Committee in the Capitol (locations TBD) and:
 - Provide an update on your meeting(s),
 - Turn in your Advocacy Visit Reports and
 - Get assistance with follow up.
- Send a postcard or note card to your legislators and his/her staff person thanking them for their time and any agreements made in the meeting.
 - A well-written, brief thank you card note is always appreciated and often better received than a lengthy letter.
 - Remember, officials get 25 complaints for every compliment. Like a wise hotel maitre 'd once taught "Only two types of people respond well to an honest compliment -- males and females."
- Monitor your legislator's actions on the issues and continue to communicate with him/her as the issue advances.
 - Don't be a stranger to your elected officials and their staff members.
 - Know them by name, and make sure they know you by name. Anonymity is the antithesis of effectiveness.
 - Invite officials to your community partnership programs for conversations and photos.
 - When it comes to creating a positive impression....Seeing is Believing.

SAMPLE THANK YOU NOTE CARD

Dear Senator _____,

Thank you for taking the time to meet with me and talk about the needs of our homeless neighbors. I really appreciate your support on H.B. 241. If you have any questions, please do not hesitate to contact me.

Sincerely,

Jane Doe
XYZ organization
(XXX) XXX-XXXX

A Summary of the Laws Governing Lobbying by 501(c)(3) Organizations

501(c)3 public charities can lobby, within limits, in support of the organization's charitable mission. Depending on which of two sets of rules the organization chooses to fall under, will determine how much lobbying the organization can do. The 'old' rules – the rules that apply unless you elect to come under the new rules – require that lobbying activities not be a “substantial” part of a 501(c)(3)'s activities. Unfortunately, the Internal Revenue Service and the courts have been reluctant to define “substantial.” Most lawyers will tell you that up to 5% of your organization's activities are safe, but this is hard to track when much of those activities may be conducted by unpaid volunteers. Furthermore, the old rules are unclear about just what activities constitute lobbying.

Fortunately, there's a new set of rules that provides much clearer guidance on how much lobbying. Internal Revenue Code Section 501(h) was enacted in 1976 and regulations implementing it were adopted in 1990. The limits under 501(h) are based on how much money the organization spends on the activity, so activities that do not incur an expense do not count as lobbying. To take advantage of these clearer rules, the organization must “elect” to do so by filing a simple, one-time form (IRS Form 5768.)

For most 501(c)(3) organizations (those with budgets under \$500,000), the organization can expend as much as 20% of its budget on its total “direct¹” and “grass roots²” lobbying. However, it may only spend a quarter of its overall limit (as much as 5%) on “grass roots” lobbying. As the size of an organization's annual budget increases, the percentage of those expenditures that the organization can spend on lobbying declines. Fortunately, an organization's members are treated as a part of the organization, so urging them to contact public officials about legislation is considered direct, not grass roots, lobbying.

There are some specific exceptions for some activities that otherwise might appear to fit the definition of lobbying under the 501(h) rules. For example, it is not lobbying to prepare and distribute a “nonpartisan analysis” that fully discusses the pros and cons of a legislative proposal (even if the analysis comes to a conclusion on the merits of that proposal.) Nor is it lobbying to respond to a written request for assistance from a legislative committee to help the committee with a legislative proposal. In addition the statutory exceptions, remember that litigation and attempts to influence an administrative (regulatory) decision fall outside the definition of lobbying.

The organization is required to track expenditures in a way sufficient to show that it has not exceeded its lobbying limits. Some of the types of expenditures that could count toward the lobbying limit are:

- staff time, spent and paid, to meet legislators, prepare testimony, or encouraging others to testify,
- expenses made printing, copying, or mailing to get the organization's message to legislators,
- pro-rated cost of any newsletter article urging the organization's members to speak out on legislation (pro-rating based on the space the lobbying message takes in the newsletter), and

- pro-rated share of rented space used in support of lobbying (a good way to handle this is to pro-rate the cost based on the percentage of staff time spent lobbying.)

The Alliance for Justice, publishes a more detailed, plain-language guide to these rules called “*Being a Player: A Guide to the IRS Lobbying Regulations for Advocacy Charities*,” which can be ordered for a cost of \$15. *The Alliance* publishes similar guides on other nonprofit advocacy topics such as election-year activities for 501(c)(3)s, their involvement in ballot measure campaigns, and foundation funding of nonprofit advocacy. *The Alliance* also offers workshops and technical assistance for nonprofit organizations. Contact the Alliance for more information.