



Nonpartisan Advocacy Planning Tool

With the ideas and tips in this tool, you can help your nonprofit and its mission be more visible to elected officials, make connections between constituents and their elected leaders about issues that impact your community, and build a stronger democracy for all. The content provided in this tool is provided in good faith for informational purposes only and is neither intended to be nor should be construed as legal or tax advice. First, a quick distinction:

Advocacy is raising awareness and mobilizing public support for an issue or set of values, such as supporting education access, ending hunger, expanding affordable housing, and so on. Nonprofits can generally engage in non-lobbying advocacy without limit.

Lobbying involves asking policy makers, either directly or indirectly (by encouraging others to do so), to vote for or against a specific piece of legislation or policy. Nonprofits that take the 501(h) election have more leeway and clear guidelines when lobbying.

1

Identify which officials make decisions related to your organization's priorities.

- a. Be clear about what your organization is trying to accomplish or change. Identify which governmental officials have authority over those policies.
- b. Check government websites or a nonpartisan resource like Ballotpedia to find position descriptions.
- c. What region do they cover (national, state, local, city council ward...etc)?
- d. What branch of government are they in (legislative, judicial, executive)?
- e. Is the position full-time or part-time?
- f. Are there certain qualifications required for the position (ex, Law director must be an attorney...etc.)
- g. Are they part of a larger body that needs a majority to pass legislation (city council or state legislative body), or are there actions they can take independently (mayor, governor, etc.)?
- h. Do they have influence over budgets?
- i. What is the timeline for their term?

2

Learn who those elected leaders are and how to contact them.

- a. Check government websites (check for .gov to be sure you're on a government and not a campaign website) for lists of elected and appointed positions.
- b. Has this person been elected to this position before? To another related position (Ex. State House to State Senate or City Council Member to Mayor)?
- c. What is their experience, professional or otherwise and what organizations are they associated with (ex. nonprofit boards, professional associations, political parties, do they volunteer or donate to particular organizations)
- d. What are the causes they care about and why?
- e. How have they voted on the issues your organization cares about?
- f. Remember to look for state, county, city, township, district, ward, borough, school district, and any other areas of government that might have elected or appointed leaders.
- g. Find their email, phone number, physical office address, and web portal if they have one (see the example tracker below) and join their email newsletter where applicable. They may answer communications directly or they may have an administrative staff member.



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Prepare your organization to build relationships with elected leaders and share your expertise.

- a. Review lobbying policies for your organization. The executive director or board should have access to or create policies to provide guidance for staff who may be carrying out the work.
- b. Learn about the policy maker's influence, goals and motivations. Is there a topic or issue in which your nonprofit has expertise? Do you operate in the elected official's district? Do any of your board, staff, or volunteers have a connection with the elected official?
- c. Make a plan for documenting and tracking any lobbying activity or interaction with elected leaders. If you have taken the 501(h) election, you'll want to document expenditures as well.
- d. Review lobbyist registration requirements. Lobbyist registration is most common at the state and federal level but may be required at the county or city level too.

4

Establish an Organizational Relationship with your Elected Official(s).

- a. Focus on building relationships with elected leaders over time. If you want your organization to be known as a trusted entity for addressing community issues, it will take time.
- b. Set up an educational meeting with them or invite them to your nonprofit to help them better understand your organizational mission and the community's need for your organization. Invite them to opt into your organization's communications like newsletters, fundraiser invitations, texts, holiday cards, etc.
- c. Be polite and persistent with communications. Elected leaders often receive a great deal of communication so response times may be slow, but it is responsible for them to respond.

5

When your organization's issue is up for a vote or critical discussion, how can you participate?

- a. Where are legislative meetings held? In person? Virtual? Are they recorded?
- b. How do you sign up to comment on legislation? What is the timeline? Written or spoken comments? (ex: via website, email, call, or in person comment)
- c. Remember that sometimes delays or changes to agendas are intentional political moves, sometimes they are just the reality of the process

6

Evaluate and celebrate your work.

- a. Talk about your advocacy work and the issues your organization is addressing. Advocacy can be an important part of your mission and a great way to engage new audiences.
- b. Document and evaluate your work to ensure the lessons you learned and relationships you built will position your organization to be more effective each year.

Resources

- [Lobbying Under the Insubstantial Part Test](#) (the default for nonprofits), from Alliance for Justice (AFJ)
- [Maximize Your Lobbying Limit by taking the 501\(h\) Election](#), from Bolder Advocacy / Alliance for Justice (AFJ)
- [IRS H Election Form](#)
- [Advocacy vs. Lobbying: Language Matters](#), from Alliance for Justice (AFJ)
- [Ballotpedia Directory of Elected Officials](#)



Example Elected Leader Tracker

These are all made up examples to show possibilities. Create your own based on your locality with this tool

Position	Name	Phone	Email Address	Last Elected & Next Election	Responsibilities	Notes <i>(When they were elected, when their next election is, if they've held any elected positions in the past)</i>
U.S. Senator	Ex. Jo Jenkins	(555) 555-5555	jo.jenkins@us.senate.gov Staff Scheduler: Percy Price percy.price@us.senate.gov	Last: 2024 Next: 2030	Ex. Votes to confirm presidential appointments	Ex. Former teacher, voted in favor of additional FEMA investment
U.S. Congressional District(s)						
Governor						
State Senator						
State Representative						
County Executive, or Commission						
Mayor						
City Council Member						
School Board Members						