Educate & Advocate:

Making a strong case for your mission with your supporters and policy makers





Mission: to invest in the economic self-sufficiency of women and opportunities for girls in Wyoming.

Since 1999, WYWF has made more than \$1 million in grants to nonprofits advancing self-sufficiency for Wyoming women and girls.



Join at slido.com #163279

Please ask your questions here. We'll be answering them at the end!



Contents

What is Advocacy? **Gearing up for Advocacy** Advocacy vs. Lobbying **Advocacy & Communication** Wrap-Up and Questions





Advocacy is any action that advances issues and helps bring about systemic, lasting change on behalf of others.

Advocacy can encompass a lot of activities:

- Research
- Public education
- Lobbying
- Voter education
- Speaking on your expertise







What opportunities await?



PROGRESS



RELATIONSHIPS



RECOGNITION

Is advocacy the right road for your organization?

 Do you need your supporters, the public, or lawmakers to be more informed about an issue so they can share the importance of your mission with others?



Is advocacy the right road for

your organization?

 Would your organization be closer to fulfilling its mission if you could get one or more policies or laws changed at the local, county, state or federal level?



Is advocacy the right road for

your organization?

 Does your board want to make advocacy a priority of the organization?

- Now?
- Sometime in the future?
- Never?
- **IDK**5



Get ready to advocate!





How does my organization start to advocate for our mission?



Review advocacy vs. lobbying



Work with your board



Produce an advocacy plan



Collaborate with other non-profits and organizations who advocate for similar causes



Keep track of any lobbying activities



If necessary, submit record of lobbying to IRS and WY Sec. of State





- Facilitated planning session
- Evaluate capacity and resources
- Compile info into a formal plan
- Execute plan for at least a year
- Gather feedback
- Refine
- Repeat!







Advocacy activities your organization could do:

Educate the Public Inviting **Educating** Legislators to about the **Organizing** Research Organize a rally Legislators your facility or Legislative **Process** event Regulatory Nonpartisan voter Nonpartisan voter **Public education** education: Inform efforts: take mobilization: **Educational Trainings** action at the on the issues the electorate on encourage conferences agencies the issues citizens to vote. Litigation **Draft** a petition Write an Op-Ed Lobby

Be mindful of these challenges!





Is lobbying legal for non-profits (including 501(c)(3) organizations)?



Disclaimer

The information provided in this presentation does not, and is not intended to, constitute legal advice; instead, all information, content, and materials presented are for general informational purposes only.



What is Lobbying?

- Communication referring to specific proposed or pending legislation or position appointment needing Senate confirmation[AND]
- **Expresses a view** on proposed pending legislation or the appointment [AND]
- Does not meet lobbying exceptions [AND]
- Is directed to:
 - A legislator or legislative staff [OR]
 - The voting public (includes a call to action) [OR]
 - Other people or groups to plan/create materials that will be used for direct communication to legislators



Lobbying: Indirect vs. Direct

Indirect/Grassroots

- Communicating a view
- About specific legislation
- To the public
- With a call to action
 - e.g., asking recipients to contact legislators or providing method to do so

Direct

- Communicating a view
- About specific legislation
- To legislator, Legislative Services Office (LSO) staff, or a legislative committee

Both Indirect and
Direct Lobbying
must be tracked for
nonprofits.



These activities are not lobbying!

Lobbying exceptions:

- Non-partisan analysis
- Requests for expertise
- Self-defense communication on legislation impacting operations
- Discussions of broad issues vs. specific legislation





Nonprofits & Lobbying Tracking

Substantial Part Test

- Examines all activities contributed to lobbying, not expenditures.
 - Vague rules for what is considered "substantial" by the IRS

Must complete Schedule C in Form 990:

- "Detailed" description of lobbying activities
- Yes/no to specific types of lobbying

Expenditures Test

 Only examines expenditures contributed to lobbying.

Must complete Form 5768:

- Sets lobbying expenditure ceilings (sliding scale) based on nonprofit's exempt purpose expenditures.
- There are different limits for overall direct and indirect lobbying (1/4 of overall lobbying limit is indirect, or grassroots, limit).

Must complete Schedule C in Form 990

WY Requirements to Lobby

- The State of Wyoming defines "lobby" or "lobbying" as an attempt to influence legislation. Individual lobbyists working at the state level are required to register each year with the Wyoming Secretary of State's Office W.S. 28-7-101(c).
 - The lobbyist registration period is from May 1 to April 30
 - Lobbyists are required to provide the names of organizations whose interest they represent
 - The database of lobbyists is updated throughout the year
 - Lobbyist Activity Reports



Other Restrictions

Private Foundations

Using Certain Funds

Hatch Act

Partisan Activities



Private Foundation Restrictions

Private foundations cannot:

- Engage in lobbying activities, nor directly support lobbying activities through earmarked grants for lobbying
 - Prohibitive tax on lobbying activities for their organization
 - Very significant
- Engage in partisan activities

Private foundations can:

- Engage in advocacy
- Support grantees that lobby
- Support nonpartisan electionrelated activities

Private foundations have restrictions on:

Funding voter registration activities

Using Certain Funds

- Some types of funds are restricted from being used for lobbying
 - Donor restricted funds
 - Federal funds
 - Private foundation funds
 - Specific project or general support grants are okay if they meet certain criteria
- When budgeting for lobbying, remember to examine funding sources to ensure they are permissible for use

Hatch Act Restrictions

Federal law passed in 1939.

- Limits certain political activities of federal employees
 - Including some state and local employees who work with federal funds

AmeriCorps members are restricted under the Hatch Act!

 The U.S. Office of Special Counsel website has information about the hatch act and a place to request an advisory opinion in case you need some clarity.

501(c)(3) Partisan Activities

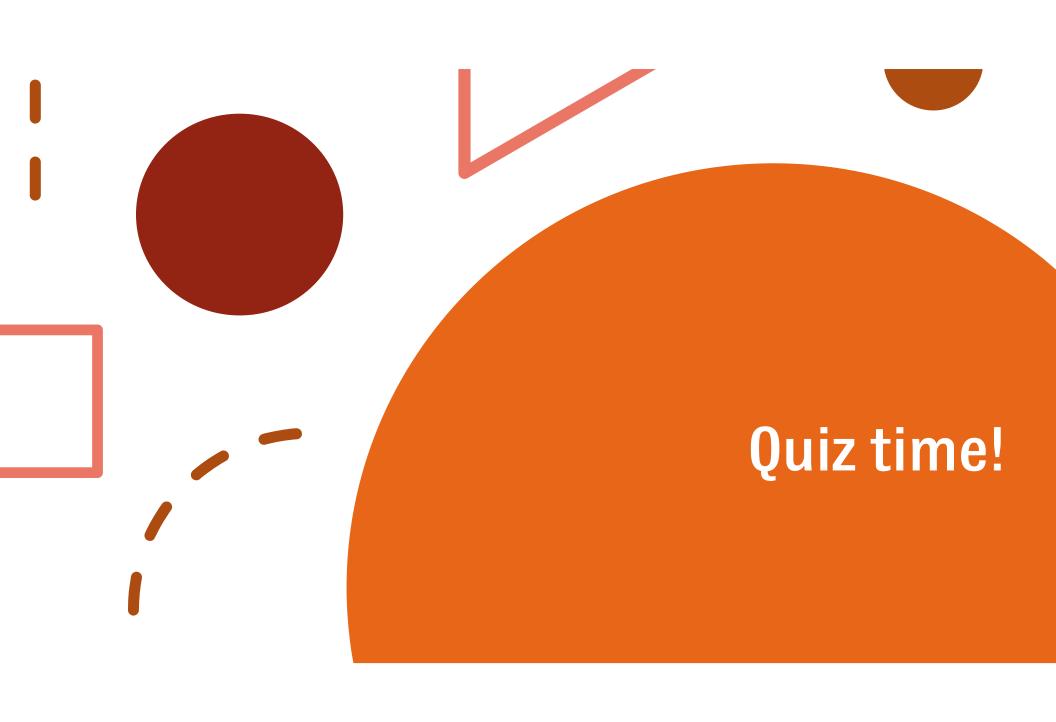
The IRS prohibits 501(c)(3) organizations from directly or indirectly participating in any political campaign.

It's an election year!

 Even voter education activities with evidence of bias are prohibited, though non-partisan voter education or registration activities are not.

Bolder Advocacy has resources on these distinctions, and the IRS has trainings on maintaining tax-exempt status.

- Bolder Advocacy Checklist for 501(c)(3) charities
- IRS Training on Maintaining Tax-Exempt Status





A Wyoming policy nonprofit hosts an annual training for the public to become grassroots lobbyists.

Is this lobbying or advocacy?





A local environmental 501(c)(3) sends an email to their supporters urging them to vote for Sam O'Man who is a staunch supporter of wildlife.

Is this allowed?





WYWF calls their supporters to urge legislators to vote no on House Bill 1239 because it affects women negatively.

Is this lobbying or advocacy?





A Legislator contacts WYWF for facts from their data report, "Wyoming Women as Economic Drivers", that may have implications for a piece of proposed legislation.

Is this lobbying or advocacy?







Communication is the imparting or exchanging of information or news.

Five Types of Communication:

- Verbal Communication
- Non-Verbal Communication/ Body Language
- Written Communication
- Visual Communication
- Active Listening



Key Considerations



CONSISTENT BRANDING



AUDIENCE



COMMUNICATION TOOLS



CONTENT TYPES





Organize Your Advocates

What is a WYWF Power Advocate?

Civically engaged individuals passionate about investing in the economic self-sufficiency of women and opportunities for girls.

What do WYWF Power Advocates do?

Use the information provided in WYWF's Annual Legislative Watch and Action Alerts to speak out for Wyoming women & girls.

P.S. You can become a Power Advocate at wywf.org right now!



Who Hears What?

Advocates

- Updates
- Action Alerts
- Deadlines

Supporters

- What's happening
- Why it matters

Public

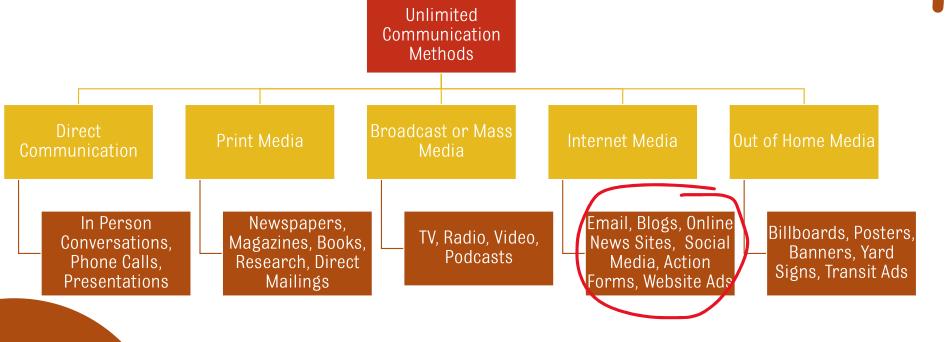
- · Statewide research
- Your voice matters
- We are a resource

Decision Makers

- Impact
- Policy discussion
- Direct lobbying



Reaching Your Audience Where They Are





Internet Media: Social Media







INSTAGRAM



TWITTER, LINKEDIN, TIKTOK, PINTEREST



Internet Media: Email Communications

Supporters

• <u>Annual Legislative Watch</u> (weekly updates)





Internet Media: Email Communications

Advocates

 Action Alerts & Deadlines (daily or more)



HAPPENING NOW: Call & E-mail your Senators and Representatives to <u>vote NO</u> on: Pregnant Mothers: Child Endangerment Bills

Find your legislators

HB0085 Child endangering-controlled substance use while pregnant.

Sponsored by: Representative(s) Oakley, Baker, Barlow, Crago, Flitner, Larsen, Romero-Martinez, Sommers and Winter and Senator(s) Baldwin, Drisklil, Hutchings and Kolb AN ACT relating to crimes and offenses; creating a new endangering children felony; providing a newalth.

SF0089 Child protection-dangerous drugs.

Sponsored by: Senator(s) Hutchings, Kolb, Salazar and Steinmetz and Representative(s) Baker, Bear, Duncan, Haroldson, Oakley, Olsen, Ottman and Washut

AN ACT relating to crimes and offenses; creating a new offense for child abuse; providing a penalty; amending requirements for mandatory reporting of suspected child abuse.

WHY THESE BILLS MATTER FOR WOMEN & GIRLS: These punitive policies push women away from healthcare that they need to have a healthy pregnancy. According to research by Dr. Laura Faherty, "more infants were born with drug withdrawal symptoms in states with policies that punish pregnant women for substance use. This was the case both immediately after the policy was enacted, and in the longer term." Pushing pregnant women away from healthcare has detrimental effects for women and their babies.

-Source: https://jamanetwork.com/journals/jamanetworkopen/fullarticle/2755304

To learn more about this research, click here.





Internet Media: Email Communications

Decision **Makers**

- Impact to state and our mission (semi annually or as needed)
- Policy Suggestions (as needed)
- We are a resource





As the health and economic impacts of COVID-19 increase in Wyoming, we are aware that our state and local leaders and elected officials are faced with decisions on how to keep Wyoming strong during this trying time. We appreciate the importance of this task and want to offer a resource that could help inform your decisions

The Self-Sufficiency Calculato r provides information on what the cost of living is for families in Wyoming based on their county of residence and the composition of their family.

Please use the Calculator to get a clear picture of the amount of income families in your community need to meet their very basic needs at a time when, unfortunately, so many will be struggling.

Because this information was just released last month, you have access to the most recently available data on the cost of living in Wyoming. While things are changing rapidly, we are fortunate to have the 2020 Self-Sufficiency Standard as a reference point for what it takes for families to meet their most basic living expenses. Please use it as you make decisions to address community and family needs.

Thank you for your service to Wyoming. We appreciate your

WYWF Director Rehekah Smith



The Wyoming Women's Foundation is a priority fund of the Wyoming Community Foundation, which granted out over S8 million to nonprofits across the state in 2018, and over 575 million since its inception in 1989. The Women's Foundation builds on a permanent endowment that will ensure funding to enhance the lives of women and girls in Wyoming for generations to come. It makes grants to organizations that help Wyoming women and girls attain economic self-sufficiency, creates statewide awareness of the barriers to economic self-sufficiency, and supports systems change to eliminate those barriers. Learn more at www.wywf.org.

To learn more about WYWF visit us at WYWF.org , on Facebook @ WYWon











Internet Media: Action Forms

Email

 Automatically match advocates to their elected officials and prompt them to send custom or template messages.

Social Media

 Mobilize advocates to tweet at elected officials using a simple, customizable online form.

Click-to-Reach

 Embed a form into your website and drive calls, emails and tweet with the click of a button!





Upcoming Research

Social Media

Newsletters

Direct Mailings

Facebook Event

Radio

Emails

Launch!

Printed Research

In-Person Event

Press Releases

Direct Mailing

Emails

Social Media

Online Articles

Newspaper

Radio

Ongoing Impact

Annual Report

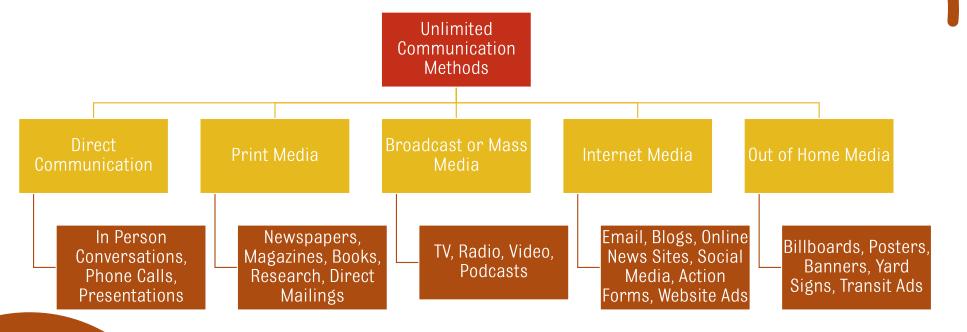
Social Media

Newsletters

Online Articles

In Person Events

Reaching Your Audience Where They Are





You Can Do It!



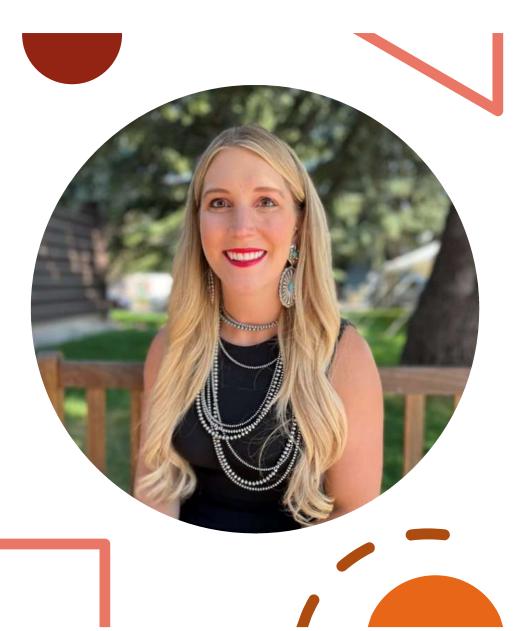
WHERE CAN ADVOCACY GET YOU?



ADVOCACY PLAN



COMMUNICATION PLAN



Board Member Perspective

Megan Degenfelder is a leader in the fields of coal and oil & gas and a former executive at the Wyoming Department of Education.

Having built a career in a male-dominated industry, Megan is committed to ensuring equal access for women and girls in economic self-sufficiency and other opportunities.

Megan has served WYWF as a board member, board chair and as a Wyoming Women's Antelope Hunt committee member!



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Audience Q&A Session

① Start presenting to display the audience questions on this slide.





Marissa at Marissa@wycf.org
Bekah at Rebekah@wycf.org
Alex at Alex@wycf.org
Megan at megdeg9@gmail.com





Resources

- Bolder Advocacy
- Stand for Your Mission
- Equality State Policy Center
- The IRS website
- <u>WYWF Advocacy Resources</u>

