Protect Giving Advocacy Toolkit

www.ProtectGiving.org
#ProtectGiving

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I. Introduction

Members of the Charitable Giving Coalition are having an impact in helping elected officials in Washington, D.C., see the inextricable link between charitable giving and thriving communities. Holding face-to-face meetings with legislators, testifying at congressional hearings, generating dozens of op-eds, articles and editorials, and engaging stakeholders via social networking platforms, all of which communicate the importance of the charitable deduction.

It is imperative that members of Congress and their constituents clearly understand what's at stake for charitable giving and communities if lawmakers place limits on the charitable tax deduction. Billions of dollars, millions of jobs and vital services are at risk.

This "Protect Giving Toolkit" provides guidance and materials to help Coalition members demonstrate the value of the charitable deduction and how communities would be negatively impacted by tax policy changes that could harm charitable giving.

Our collective efforts will strengthen our chances of ensuring the 100-year-old charitable deduction remains intact as a vital tax incentive that encourages giving and strengthens communities.

Whether your staff is large or small, this toolkit can help you communicate more effectively. The Coalition can also provide one-on-one help using the toolkit to ensure your success.

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II. Communication and Outreach Goals

- Demonstrate the momentum behind efforts to raise awareness about the inextricable link between charitable giving and thriving communities.
- Create a sense of urgency – directly and through media and social networking channels – about what's at stake under any proposals that would limit the charitable deduction.

III. Core Messages – Speak with Impact

Make your case persuasive and memorable with clear, concise and compelling messages. Research shows that messages delivered in three's are the most persuasive, so stick to these three points:

- **Any limits on the charitable deduction would unleash cascading consequences for America's communities**. When giving is reduced, jobs are lost, disease research stymied, economic development stunted, support services for the most vulnerable dry up, education, arts and recreation opportunities diminished. *A lasting economic recovery requires a strong charitable sector.*
- **The charitable deduction is a lifeline for millions** (not a loophole). It must be protected for a strong economy and democracy.
- **We are the charitable deduction** – our communities, the services we provide, the opportunities we create, the people we help. The century-old American tradition of giving works, generating impact government and the private sector cannot replicate.

A complete set of Coalition talking points is available in the Take Action section of the Coalition's website: http://protectgiving.org/take-action/templated-docs/

IV. The Target Audiences

- Policymakers who craft and decide on tax reform proposals
  - Members of Congress, Hill staff, Administration leadership
- Community leaders who depend on nonprofit services
  - Local civic leaders and elected officials
  - Nonprofit, charity, and foundation leaders
- Constituents who vote for elected leaders and depend on a strong nonprofit sector

V. The Momentum – Keep the Drumbeat Going

Protect Giving Day was one important opportunity to raise awareness about the importance of the charitable deduction, but as a Coalition, we must continue to make our case throughout the year as Congress considers tax reform. The Charitable Giving Coalition's work is an ongoing effort to educate our target audience about the vital role of the charitable sector and what's at risk if charitable giving declines. The Coalition's broad, diverse membership – and geographic spread – presents a number of opportunities to amplify our messages and make a strong case for protecting the charitable deduction.

The Coalition is providing specific materials for your use throughout the year. The guidance below can help ensure meetings and other outreach activities are successful and establish a foundation for an ongoing, productive working relationship with lawmakers.

Depending on the local political environment and what works best for your organization, there are multiple ways to structure your activities locally to raise awareness about the impact of tax policy changes at the community level, including through media and social networking channels. Remember, the Coalition can help and can work directly with you to plan and execute any of the following outreach options. But first, a few planning pointers:

- <u>Preparation is Key</u>
  Before the meeting, be sure to do your homework. Learn about the members with whom you are meeting. Some key questions to answer include:
  - What committees do the members serve on?
  - Do they have any leadership positions on those committees?
  - What issues are their key priorities (economy, education, etc.)?
  - What positions/votes have they taken on the charitable deduction?
  - What is their record on policies impacting the nonprofit sector?
  - What personal or professional experience do they have that is relevant to nonprofits?

  Keep the answers to these questions in mind and incorporate them into conversations and other activities as appropriate.

- <u>Notifying the Media</u>
  If appropriate, issue a news release or news advisory notifying the media of your efforts. These notifications should be accompanied by phone calls to your local reporters and editors to make sure they have the relevant information and

answers to any questions. You can also coordinate with reporters and editors for day-of interviews to provide your perspective from Washington via phone.

- Meeting Day – Getting in the Zone
  Face-to-face meetings with elected officials can bring on a bit of anxiety. Preparation can offset that, but remember that legislators are eager to see and meet people from their state/district. Their job is to represent constituents like you and learn how policies affect their home district. Your perspective and expertise about community-level needs and activities informs their decision-making and helps strengthen their impact on behalf of their constituents.

- The Staff Alternative
  While members try to meet with as many constituents as possible, it may be necessary to meet with a staff member instead – in Washington or in the district/state. Don't be disheartened. Meetings with staff provide an equally important opportunity. Staff members wield considerable power and often are able to give more time and attention to the issues than legislators can.

- Remember the Goal
  While you may have several local issues that are important to discuss, remember the goal for the one-on-one meetings is to urge lawmakers to protect the charitable deduction. That should be the one thing they remember from the discussion. It's imperative that the entire coalition speaks with a unified voice, so we recommend refraining from bringing up additional issues during the meeting about the charitable deduction.

- After the Meeting
  Your mother was right – thank-you notes matter. Send a personalized letter thanking the member or staff for their time, recap key items during the discussion and establish a foundation for an ongoing working relationship. The letter should touch on the following:
    - Thank him/her for recognizing of the vital role that charitable giving plays in communities – supporting nonprofit efforts to create opportunities and aid the most vulnerable.
    - Reiterate the key messages and takeaways from the meeting, address any follow-up items or requests from the member.
    - Include a reminder that your organization is committed to working with lawmakers to ensure they have a clear understanding about what is at stake in our communities if they tamper with the charitable deduction.

  Add the member and staff to your email and snail mail distribution list for newsletters, press releases and relevant events. For a sample thank-you note, see the toolkit materials in the Take Action section of the Coalition's website. http://protectgiving.org/take-action/templated-docs/

One-on-One Meetings
Individual meetings with key staffers and/or congressional members in district offices can reinforce the impact of tax policy changes locally. Such meetings could also include other nonprofit, foundation or community leaders who can share their "on-the-ground" perspective. Members have hectic schedules. To ensure your time with lawmakers and their staff is well-spent, an agenda such as the following can keep you focused and on schedule. A sample agenda could include:

- 10-10:05 a.m.: Thank the member/staff for making themselves available; introductions.
- 10:05-10:10 a.m.: Cut to the chase – tell them why you're there – to urge them to protect the charitable deduction and avoid harmful changes that could have devastating consequences for communities they represent.
- 10:10-10:35 a.m.: Make the case – lay out for members and staff what is at stake (core messages/talking points/examples of local impact). Some key considerations:
    - Thriving communities depend on nonprofits and charitable giving.
    - If harmful tax policy changes are enacted to thwart charitable giving, donations will decline and communities will suffer.
    - Slashing the deduction is not a solution – particularly as funding for charities is so uncertain and demand continues to grow (illustrate with local examples).
    - Express a commitment to working together to find solutions that protect giving and communities.
- 10:35-10:50 a.m.: Listen and learn – ensure there is enough time for questions from members and their staff.
- 10:50-10:55 a.m.: Action items – You may not have immediate answers to questions that come up during your conversation. That's OK. Be sure to take notes or keep a running list of issues that require follow-up. Be sure to ask the staff in attendance for their business card(s) to establish a primary point of contact moving forward.
- 10:55-11 a.m.: Final thoughts and meeting conclusion.

Site Visits to Demonstrate the Community-level Impact of Charitable Giving and Nonprofits
Often, elected officials are removed from the programs and services that help their

district residents. Congressional members and staff can witness first-hand the impact that charitable giving has in communities by visiting nonprofits and seeing them provide key programs and services. Site visits provide a direct connection to the issues facing residents and can help secure the support of a policymaker for a critical policy issue or program. In addition, site visits can strengthen your relationship with your representatives and give them a greater understanding of the role and value of your organization in the community.

Be sure to include key community leaders and advocates, as well as beneficiaries and donors. Site visits can also be promoted to the local media if appropriate. Here is a suggested agenda for a site visit:

- 11:00 a.m.: Representative or senator arrives and is greeted by the organization's leadership (executive director, board members)
- 11:05-11:20 a.m.: Begin tour of the nonprofit facility and programs in action, introducing the member to staff and program beneficiaries – children, parents. (Be sure they are prepared to describe their experience and the difference a program or service has made in their lives.)
- 11:20-11:50 a.m.: Group discussion (a room should be set up prior, such as a conference room or chairs set up in a circle) with leaders, program staff, and beneficiaries for an informal discussion about the importance of the program in your community and the importance of charitable giving in its success. Be sure to:
    - Thank and recognize the member for participating.
    - Highlight relevant program impact and funding data, including fluctuations and how much is supported through charitable giving.
    - Allow time for the member to hear about your legislative priorities and to hear from him/her about their position or the status of the policy debate in Washington.
    - Ask what you can do or what additional information is needed to ensure they are fully informed about the potential consequences of their actions/votes on the issue.
- 11:50 a.m.: Thank the representative or senator and their staff for visiting your facility and reiterate your commitment to working together on a shared goal of supporting a thriving nonprofit sector. Provide a few moments for the member to offer his/her final thoughts.
- Noon: Program ends.

Community Town Hall on Charities and the Economy
A Town Hall is a public meeting where attendees can discuss issues with elected officials and allows people an opportunity for them to voice their opinions and ask

questions of policymakers. A community-wide event can foster a conversation about the role/impact of charities in the community and the potential consequences if lawmakers tamper with the charitable deduction. They give officials a better understanding of the needs and challenges in their communities. The agendas above should provide appropriate guidance for structuring a Town Hall.

Below are common considerations for planning and executing a successful meeting or event:

Step 1 – Send the Invitation

Contact the elected leader's scheduler via email. In the invitation, be sure to include:

- Some background about the purpose of the event, the preferred time and date and the specific role you'd like the member to play, such as a featured speaker.
- Relevant materials about the issue.
- Contact name, number and email for your organization.

- Be sure to follow up on your invitation with a phone call to the district or Washington, D.C., office to make sure it has been received and to find out the process for considering scheduling requests. Many congressional offices provide scheduling requests on their website, so check there to see if that option exists.
- Establish a cordial relationship with the scheduler. He/she will often determine the member's participation and coordinate any briefings in preparation for the meeting.
- Be flexible. Keep in mind that the member's schedule can change without notice. If he or she is not able to attend or participate, invite a staff representative to attend in their place – which is a common alternative. Staff often attends events on behalf of their boss.

Step 2 – Gather the Troops

- Engage your organization's leadership, board or volunteers in planning meetings or events, especially if they know the member personally or have an influential role in the community.
- Identify board members, youth, volunteers, program participants, or staff who can be most compelling in describing the impact and importance of your work. Consider:
  - Colleges, community colleges, universities and training centers

- Educators – including teachers, principals and students – local & state school superintendent, local & state school board members
- Faith and cultural organizations
- Families and family support centers
- Hospitals, clinics and health outreach programs
- Housing and food bank organizations
- Local businesses, chambers of commerce and employers
- Senior-citizen service organizations
- Youth groups (Girl & Boy Scouts, YMCAs, YWCAs, Boys and Girls Clubs, etc.

Step 3 - Assign Roles and Responsibilities

- Clarify who will take the lead or who will emphasize particular points.
  - Who will develop the agenda?
  - Who will create informational packets (fact sheet, FAQ, news articles, program details, etc.) for the event?
  - Who will greet the member?
  - Who will kick off the meeting program and set the tone and framework for the discussion?
  - Who will share specific data, research, or other information?
  - Who will share a compelling personal or community-level story about the role of charitable giving in your community?
  - Who will "make the ask" for the member's commitment to talk with colleagues, support legislation, etc.?
  - Who will ask about next steps, a day-to-day point of contact or timing of when you should hear from his/her office?
  - Who will take notes during the meeting or event?
  - Who will be responsible for follow-up on information requests?

Step 4 – Additional Considerations

- *Find and address/recognize relevant positions* or statements the member has taken on the charitable deduction issue or their record in supporting the nonprofit sector.
- *Respect the legislator's schedule*. Start on time and stay on schedule. Be prepared to end the discussion, tour, etc. early if necessary.
- *Stay positive when conversations turn contentious*. Phrases such as, "I certainly understand your point of view, but it's important to remember…" or "We appreciate your thoughts on that topic, but maybe we can set up a side

discussion after the event." (For additional tips on this issue, see Message and Media Guidance in the Appendix.)

- *Engage the media***.** Ask the congressional office if it is okay to invite media. Work with the member's press staff to send a media alert to invite press and to prepare a press release for the day of the event.
- *Take pictures*. A picture is worth a thousand words! After the meeting, ask if you can capture the moment. Share the photos with your local newspaper, include them in your organization's newsletter, post them on Facebook and Twitter or in a spotlight on your website.

The Media – Establishing and Maintaining Good Relations
Newsrooms in your community play an important part in keeping the charitable deduction issue top of mind among opinion leaders in your community. Following are ways to engage the media, raise awareness about the charitable deduction and strengthen relationships with journalists:

Editorial board with local newspapers – To reinforce with local opinion leaders the importance of protecting the charitable deduction and provide statistics of the local impact if lawmakers unravel the charitable deduction. A newspaper's editorial board sets the tone and editorial policy of that publication. Their support can have a significant impact in shaping opinions and foster a community-wide discussion about a variety of important issues, as well as influence policymakers.

Desk-side briefings – One-on-one conversations or lunches can raise awareness among reporters about how decisions in Washington, D.C., impact local nonprofit programs and services, the economy, etc. It can also establish your organization as a go-to, credible resource on the issue.

News releases – Issued regularly and tied to a timely news hook, news releases sent to media outlets in the community can serve as a way to announce a particular activity or development related to your organization and the charitable deduction. Often, one or two reporters can be assigned the "nonprofit beat." It's important to remember that you can also make the issue relevant to reporters on business, health and education beats by demonstrating the impact in each of those sectors. An additional topic for a news release could provide "impact facts" each week that highlight a service or benefit made possible through charitable dollars.

Online engagement – Tweeting and posting on Facebook is not a one-way conversation. In addition to joining and driving discussions about important topics, engaging media by sharing resources or pitching stories through social networking can be an effective way to spread the word or reach reporters directly. As always, be sure to use the #protectgiving hash tag!

Op-eds – Opinion editorials submitted to local news outlets provide a valuable – and unfiltered – way to convey core messages about the importance of the charitable deduction and reach a wide audience. They also remind lawmakers about the local impact of the decisions they make in Washington, D.C. Possible news hooks could include:

- Introduction of tax reform legislation
- Season of Giving/Thanksgiving
- End of year/new year's reflections
- Annual economic impact data of nonprofits

For more guidance about effective media relations, see the Message and Media Guidance section in the Appendix.

Online Outreach and Social Networking - #ProtectGiving!

For those organizations with an active social networking presence, there are several online outreach opportunities to share information and resources, as well as contribute to or drive a conversation. And, don't forget to use the #protectgiving hash tag as often as possible! We can work directly with you to guide your own online outreach efforts.

Blogs – An effective way to inform, engage and activate your network of contacts is by blogging. Many Coalition members have their own blogs where they post regularly on a wide variety of topics. The debate surrounding the charitable deduction is certainly a worthy topic to offer your perspective.

Facebook and Twitter – Grab the attention of your network of contacts via these social networking platforms. You can direct stakeholders to useful resources about the charitable deduction (including links to news articles, op-eds, new reports or research, online resources or your own blogs).

Following is a set of Twitter accounts, hash tags and sample tweets that can be used to engage directly with key members of Congress, committees and issue-specific communities.

Engaging the Twitter accounts of elected leaders can help you reach target audiences directly and spread the word more broadly to stakeholders and others following the charitable deduction debate. Be sure to include Twitter handles for your representatives/senators – a simple Google search will help you locate them. Some examples of handles and hash tags include:

@RepDaveCamp

@MaxBaucus

@WaysandMeansGOP

@WaysMeansCmte

@SenateFinance

@GOPSenFinance

@simplertaxes

C-SPAN has a handy list of congressional Twitter handles:
https://twitter.com/cspan/members-of-congress/members

Hash Tags

#protectgiving (Following this hash tag can provide a sense of the kinds of tweets that may work for your own outreach.)

#taxreform

#philanthropy

#nonprofits

#charities

#foundations

#charitablededuction

Sample Tweets

Communities are at risk. Tell #Congress to #protectgiving! ow.ly/kSrf1
@RepDaveCamp @MaxBaucus @simplertaxes

#Jobs, services and support for needy at risk
@RepDaveCamp @MaxBaucus @simplertaxes ow.ly/kSiFF
Tell #Congress to #protectgiving! ow.ly/kSrf1

#Charities telling #Congress to #protectgiving http://bit.ly/1fyHntH

#Charities are vital to a strong #economy, thriving communities ow.ly/kSrf1 #protectgiving

Joining forces on 11/ 20 to tell #Congress to #protectgiving ow.ly/kSrf1 @RepDaveCamp @MaxBaucus @simplertaxes

VI. Making the Most of Your Time – Key Activities and Communications Calendar

All of the recommended advocacy activities may seem overwhelming to incorporate into an already busy schedule. It doesn't have to be!

Key Activities

If you have 30 minutes…

Send a letter to the editor!

Letters to the editor are very short – typically 200 to 250 words. They can be sent to the editorial page editor of your local newspaper in response to a relevant news story or editorial, or to raise awareness about your efforts that are connected to current coverage and community events, such as Protect Giving Day or the holidays and the season of giving.

If you have an hour…

Put out a news release!

There are a variety of opportunities to keep your media contacts aware of your outreach efforts. For example, you could distribute a news release to let your local media know you are coming to Washington, D.C., as a citizen-lobbyist, making the case for charitable giving and thriving communities. You can email this to your local media with a brief, personal note from you, conveying your availability for interviews or commentary before, during or after Protect Giving Day. Send it to the media about two weeks beforehand and, as with all these items, follow-up via phone.

Another consideration is to issue a news release about new data that demonstrates community need, as well as the impact of the nonprofit sector. Your organization could also issue a public statement reacting to policy developments in Washington, D.C. It is an effective way to convey to members of Congress that your organization is closely monitoring the debate and is not afraid to be vocal.

Pitch the media!
This provides the media with some ideas how they might cover your advocacy efforts. This can be used on its own or as a follow up to the main release (above). The media will often take your suggested story ideas and adapt them to better suit the editorial approach of the media outlet.

If you have more time:

Write an op-ed!
Read by influentials, op-eds give you the opportunity to be both persuasive and authoritative. They should be submitted to the editorial page/op-ed page editor and are typically considered for a week to 10 days. After that time, either follow up or consider another outlet. There is a template op-ed in the Take Action section of the Protect Giving Website. To give you a sense of the finished product, here are some examples from Coalition partners who successfully published op-eds:

US News
http://www.usnews.com/opinion/articles/2012/11/26/dont-eliminate-the-charitable-tax-deduction

Charlotte
http://www.charlotteobserver.com/2013/09/01/4276721/congress-should-keep-charitable.html

St. Louis/Southwest IL
http://www.ibjonline.com/charitable-deductions/161-tampering-with-the-charitable-deduction-hurts-communities-needy-the-most

Cleveland
http://www.cleveland.com/opinion/index.ssf/2013/04/dont_tamper_with_charitable_de.html

Atlanta
http://www.bizjournals.com/atlanta/print-edition/2013/04/26/dont-reduce-charitable-deductions.html

Columbus, OH
http://www.bizjournals.com/columbus/print-edition/2013/05/24/allen-attack-on-charity-deduction-is.html

Indiana
http://www.shelbynews.com/articles/2013/07/05/opinion/doc51d34279d818b815566061.txt

Newark
http://www.nj.com/njvoices/index.ssf/2013/07/communities_lose_if_donations.html

Miami
http://www.miamiherald.com/2013/06/23/3464284/dont-tamper-with-charitable-deduction.html#storylink=cpy

Communications Calendar
Establishing a calendar can be an effective way to stay focused and to ensure there is steady stream of communication about the value of the nonprofit sector throughout the year. Following are a few ideas to keep the charitable deduction top of mind each month:

Month 1

- Letter to elected officials
- One-on-one meeting with members/staff in district offices
- One-on-one meeting with reporter/editor
- Ongoing social media outreach (Facebook, Twitter, blog)

Month 2

- Local event/site visit during congressional recess
- Ongoing social media outreach (Facebook, Twitter, blog)
- Editorial Board meeting with local newspaper
- Op-ed showing value of charitable giving/nonprofits in supporting thriving communities, economic recovery, job creation

VII. The Templates

The Take Action section of ProtectGiving.org provides a set of materials to guide your communications and outreach efforts. They can be tailored to fit your needs.
http://protectgiving.org/take-action/templated-docs/

Talking points – to help ensure that each spokesperson or representative will be able to speak substantively about the issue and what is at stake.

News releases – to be distributed to your local news outlets regarding what is at stake in our communities if lawmakers tamper with the charitable deduction. Organizations can customize as necessary with community-level examples and statistics.

Template op-ed – to be submitted to local newspapers. We have already seen some success and we want to keep up the pace on placement, particularly in communities represented by lawmakers who are members of congressional tax policy committees.

Letter to elected officials – an effective way to reach members of Congress directly and make sure they fully understand your organization's position on the issue. They can also be shared with local stakeholders and the media to keep them updated on your efforts.

Additional materials – These materials are also included in Take Action section of the ProtectGiving.org website:

- FAQ
- Thank you letter

Message and Media Guidance – Communicating to members of Congress, the media and other target audiences about the value of philanthropy and nonprofits in our communities is a critical part of ensuring a growing and thriving sector.