

THE **ART OF ADVOCACY**

A HANDBOOK FOR
NON-PROFIT ORGANIZATIONS AND CHARITIES



WHAT IS ADVOCACY?

An advocate is someone who speaks up for others. The advocate may be an individual or an organization. Advocacy involves identifying, embracing and promoting a cause. Advocacy is an effort to shape public perception or to effect change that may or may not require legislation.

“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it’s the only thing that ever has.”

Margaret Mead

Far too many non-profit and charitable organizations see the political arena as a foreign world – one in which they feel ill at ease and unequipped to participate. They prefer to leave lobbying and advocacy to the “experts”. But the causes central to the missions of many non-profits and charities require them to raise public awareness, build relationships with elected officials and help shape laws and policies in order to be most effective. .

Non-profit organizations and charities do have the legal capacity to engage in advocacy or “political activity” on behalf of the individuals, communities and causes they serve. And they can bring a wealth of knowledge, experience and passion that can enrich the public debate and improve the quality of decisions regarding legislation, regulations and public policy. They can help solve the problems that they know so much about.

It is essential to recognise that the rules governing advocacy are very different for non-profit organizations than for registered charities.

Non-profit status is a category under the Income Tax Act that provides income tax exemption, but not the ability to issue tax receipts to donors. Non-profit organizations face few restrictions on their activities, and they are not limited when it comes to advocacy. They are free to engage in advocacy or political activity, including partisan activity, if it is consistent with their purposes or objects.

Registered charities, in contrast, do face legal and administrative limits on their advocacy activities. All charities considering advocacy should study the guidance found in the Canada Revenue Agency’s (CRA) publication “CPS-022 – Political Activities.”¹

¹ <http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cps/cps-022-eng.html>

That policy statement provides detailed description of what the CRA considers charitable activity, permitted “political activity” and prohibited activity. Some highlights are that:

- Partisan activity - the direct or indirect support of a candidate or party - is prohibited.
- “Political activity”, which the CRA defines in part as explicitly communicating a call to political action (that is, encouraging the public to contact an elected representative or public official and urge them to retain, oppose, or change the law, policy, or decision of any level of government in Canada or a foreign country) is permitted by charities, within limits.
- Charities can devote from 10 to 20 percent of their resources annually, depending on their size, to political activities that are linked to their purposes.
- Charities may communicate with elected representatives and other public officials, and it is not considered political activity. Charities can publically release the text of their representations to government and that too will not be considered political.
- Similarly, public awareness campaigns as defined in CPS-022 are not considered political activity, and need not be included in the 10 to 20 percent calculation.

Registered charities considering engaging in advocacy are wise to study CPS-022, and to carefully plan, document, record and report these activities so that they stay on side with these requirements.

Non-profit organizations do not need to worry about CPS-022, for it does not apply to them.

This booklet provides practical guidance to non-profit organizations and charities as they plan their advocacy work.

6 THINGS YOU MUST DO BEFORE YOU START AN ADVOCACY CAMPAIGN

1 CREATE A “WHO’S WHO” LIST

Make a list of all the governmental officials who are in positions of influence with regard to your program or mission. This list should include elected representatives, senior bureaucrats, agency staffers and others with whom you might interact. Make sure you get complete (and correct!) contact information that you can put into your database.

2 COMPILE USEFUL DATA

Nothing is more persuasive to a politician than a compelling story that demonstrates the important work of your organization. Survey your program participants for information about the impact of your programs. Often, such personal stories become the basis for government consultations, press conferences and other media events.

3 BUILD A COALITION

Any piece of legislation has a greater chance of success if it has a broad base of support. Ask around to see if there are other organizations in your region or province that could be similarly impacted. When it comes to lobbying, there is strength in numbers.

4 KNOW THE PLAYERS

Research your legislators. Learn their interests. Do they have any personal or professional ties to your cause? Most elected officials provide such information on their websites.

5 UNDERSTAND THE PROCESS

At every level of government, whether it's the House of Commons, provincial legislature or the local school board, there is a prescribed process by which bills become law or funding requests become part of the budget. While professional lobbyists are paid to know the details of this process, you should set out to learn at least the basics, including deadlines to introduce bills, committees assigned to hear certain bills, and how to amend legislation as it makes its way through the process.

6 BRIEF YOUR BOARD OF DIRECTORS

Chances are, several members of your board have personal relationships with influential people in the political arena. Discuss with your Board President the possibility of establishing a public policy committee composed of board members who are interested in helping build your political capacity.

7 STEPS TO CREATING AN EFFECTIVE LEGISLATIVE STRATEGY

1 WHAT IS OUR GOAL?

Any successful advocacy campaign must begin with a clear goal. Build on your strengths. List your organization's strategic objectives. Ask yourself, "What is it we want to do?" Do we want to introduce helpful legislation? Kill a harmful bill? Build awareness for an issue? Based on the organization's key objectives, what is your government "ask"?

2 WHO IS OUR TARGET?

Who can help us reach our goal? The answer to this question may involve several target audiences – the MP (MPP) who could sponsor the bill, the media who could build support for it and other constituent groups who could help in the overall advocacy campaign. Once you define these target audiences, then you can identify the pressure points that will cause them to respond or act.

3 WHAT IS OUR MESSAGE?

Because you are dealing with different target audiences, you will need to create a message that will be persuasive for each one. This doesn't mean you need the same message for each one – you need similar messages, each one tailored differently to each audience based on what those members need to hear.

4 WHO ARE OUR MESSENGERS?

Again, each target audience will have messengers that are more effective than others. The same message can have a different impact depending on who communicates it. For some audiences you will need "experts" to deliver your message; other audiences will be more influenced by "real people" who speak from their personal experiences.

5 WHO ARE OUR PARTNERS?

Who are some other individuals or organizations who share our goals and can help us build a broad and diverse coalition of support? Who are some groups who have influence with key legislators or impact in that legislator's district?

6 WHAT ARE OUR TACTICS?

The way you choose to conduct your advocacy campaign can vary from less intrusive (writing letters) to more aggressive face to face meetings. The most effective campaigns include a variety of tactics most appropriate to each situation and individual.

7 HOW DO WE IMPLEMENT?

What's the best way to begin to move this campaign forward? Perhaps there are some short-term projects you can undertake, such as bringing people together to discuss issues, creating a list of the legislators you need to influence or identifying local media figures who cover your particular issue.

WRITING A LETTER

Most elected officials will tell you that a well-written letter from a constituent is one of the most influential ways of communicating with them.

Keep these thoughts in mind when composing your letter:

- Be sure that the Member of Parliament or Minister's name and title are correct. Contact information for federal Ministers and MPs is listed at: <http://www.parl.gc.ca>
- Keep your letter to only one page. You don't need to be an expert. Simply demonstrating your concern is just as effective.
- Be polite and cover only one issue in your letter. Use your own words; don't use jargon or unfamiliar acronyms.
- Type your letter if possible but make your letter personal. If using a form letter, add your own thoughts. Politicians receive many form letters – make yours unique and it will catch their attention. Form letters will receive form replies.
- Be sure to include the action you would like the Member of Parliament or his government to take.
- Ask a question, the recipient of your letter will be more inclined to send a prompt response.
- When writing on behalf of your organization, tell your elected official about your organization – what you do, how many people you serve, etc.
- Be encouraging. If your elected official has taken a stand that favours your position, let your appreciation be known and thank him/her.
- While it is important to write your elected official, always send a copy to the responsible Minister as they have the power to change laws, regulations, policies or programs and need to hear from citizens directly. Similarly, when writing directly to a Minister, copy your local MP.
- Sign your letter above your typed or printed name and address. Envelopes sometimes get detached, so it's best to include your address on the inside, too.

PROPER FORMS OF ADDRESS

The Governor General of Canada

The Right Honourable - for life and to be styled *Her Excellency* and her husband, *His Excellency* or, *His Excellency* and his wife, *Her Excellency*, as the case may be, while in office.

The Lieutenant Governor of Province

Honourable for life and to be styled *His Honour* and his wife *Her Honour* or *Her Honour* and her husband *His Honour*, as the case may be, while in office.

The Prime Minister of Canada

The Right Honourable for life

Cabinet Ministers

Honourable

Minister of State

Honourable

Parliamentary Secretary

Honourable

The Chief Justice of Canada

The Right Honourable for life

Senators of Canada

Honourable for life

Ambassadors to Canada

His/Her Excellency

For further details visit:

www.pch.gc.ca/eng/1359145344405/1359145417936

E-MAIL AS AN ADVOCACY TOOL

The role of e-mail in advocacy has increased dramatically in recent years. E-mail is now considered an acceptable means of communication especially if you have already established a relationship with a Member of Parliament.

But, as e-mail communication has increased, so has the ability to ignore it. However, e-mail does remain an effective and efficient way to communicate with staff. In fact, most staff prefer e-mail messages to phone calls.

This practice emphasizes the need to see e-mail as only one component of a successful advocacy campaign. E-mail messages must be accompanied by phone calls, faxes, written letters and personal visits. And, as with written correspondence, staffers will tell you that if you are not a constituent, and if you do not provide contact information (including a complete “snail mail” address), do not expect your e-mail to be answered.

MEETING WITH YOUR ELECTED OFFICIALS

1 CALL FOR AN APPOINTMENT

Don't just walk in and expect to see an elected official. Make an appointment well in advance and specify what you will be talking about. This lets the official prepare for the meeting or delegate to the appropriate staff person. Don't be upset if you are screened by a staff member first to find out as much as possible on your subject. Be forthright with the staff and be prepared to put in writing what the purpose of your meeting with that politician will be. Politicians hate surprises. Remember - if you can't meet with the legislator – spend time with the staff. It can be highly rewarding.

2 BE ORGANIZED

Have an agenda to keep the meeting from going astray. Remember, the elected officials and their staffers will form an opinion of you, your group and perhaps your cause. Know your subject, don't overstate your case, and maintain a businesslike manner.

3 IF YOU ARE GOING AS A GROUP, KEEP IT SMALL AND HAVE A PRE-MEETING

Always take time to plan your meeting to ensure a smooth presentation. Decide who will present each topic. Choose a leader to direct the conversation and see that your agenda is followed. This is an instance where there is no strength in numbers.

4 ALWAYS BE A GOOD LISTENER

What the elected official will say will provide insight into strategy for follow-up or suggest who needs to be included in another meeting. Remember, the official needs to have his or her point of view understood as much as you do. Being attentive to his or her concerns and issues does not mean you have to agree or compromise your position. Leave time for questions.

5 BE ON TIME AND DON'T OVERSTAY YOUR ALLOTTED TIME

If an elected official asks you to continue, do so. But, remember they run on very tight schedules. If you are well organized, you can cover the critical aspects of your case in a limited time.

6 DON'T BE AFRAID TO ASK FOR SOMETHING

Don't merely ask for "support" – ask for something specific. Don't leave without asking to whom else you should be talking. Make sure you see them too.

7 DON'T BE AWED

Sure, it's an important job, but elected officials are people just like you. It's highly likely they won't understand your issue as well as you do – not because they're dumb or don't care, but because they must be "generalists" on a wide range of issues. Discuss the issue; don't lecture.

8 LEAVE FACT SHEETS – SHORT ONES

Emphasize the impact of programs or legislation on the elected official's constituents. Make sure your facts can be verified; if you quote numbers, be able to back them up. Offer to provide more information as requested.

**9 NO POLITICIAN IS ABLE TO MAKE
A COMMITMENT ON THE SPOT**

The best you can do is say "I hope to hear from you soon."

**10 REMEMBER TO SAY "THANK YOU"
WITH A SMALL NOTE**

(on your organization letterhead, of course!).

PARTICIPATING IN

GOVERNMENT CONSULTATIONS

Knowledge is power and your organization has important information that legislators need to hear before they make significant decisions about the budget, regulations, or new laws. Find out which legislative committees or caucuses are holding consultations on subjects related to your mission and ask for permission to provide testimony in person.

Here are 8 tips for effectively presenting your position to government committees:

1. Keep your statement brief. At consultations, presenters are usually asked to keep their statements under five minutes, although a longer written statement will be accepted for the record.
2. If possible, have a high-ranking staff member or well-informed volunteer present the testimony.
3. Provide a one-page summary of your testimony, as well as a longer written statement, if necessary.
4. Practice your statement several times so that you can present it in a conversational tone; don't read it word-by-word.
5. Learn everything you can about the committee members. Politicians always appreciate being addressed by name (Chairman Smith, Minister Jones, etc.).
6. Plant questions with friendly legislators.
7. Anticipate and prepare responses for opposing arguments.
8. Conclude by asking committee members to vote in support of your position.

Legislative bodies – from Parliamentary committees to the local city council – televise many of their committee hearings. If you know you will be presenting, take some time to watch a few consultations to get a feel for the flow of the event. It will help to make you more comfortable when it's your turn at the microphone.

THE IMPORTANCE OF WORKING WITH THE MEDIA

The media can play an important role in the advocacy efforts of your organization. Elected officials read their papers daily and closely follow the issues covered by the media in their legislative districts. The more you can keep the media informed about your position, the louder the voice of your organization will be to those who count.

**Here are a few ways you can strategically
(and inexpensively) work with the media:**

Write a Letter to the Editor

Let your newspaper know how a certain bill or regulation will impact your organization. This is an effective and inexpensive way to reach a wide audience.

Set up a meeting with the Editorial Board

Gather several representatives of your organization and request an editorial board meeting with your local newspaper. Use the meeting as an opportunity to highlight how the proposed legislation will impact your group and those you serve. Ask the newspaper to write an editorial about the issue or volunteer to submit a written article for the Op-Ed page.

Listen to the Radio

Monitor your local talk radio programs for mention of issues your organization cares about. Call in and let them know your position. Keep your message simple and factual.

Be a Resource

Let the media know they can come to you for information or for your reaction to particular legislative issues.

WRITE A LETTER TO THE EDITOR

Local media is one of the most important advocacy tools at your disposal – there’s no more efficient method of getting your message out to people. Writing a letter to the editor is one of the easiest ways to use the media. Follow these tips and you’ll be able to make it work for you!

Governments often leak stories to the media in order to see public response to their plans. For instance, the Ontario provincial government scrapped plans to give themselves a 42% pay raise in the fall of 2000 after a story appeared in the media and the public went ballistic! Keep this in mind when you’re watching the news and reading the paper. If you feel strongly about an issue, make your opinion known.

Letters to the Editor:

- The letters to the editor page is the second most read page of the newspaper. (Front page is first)
- Most newspapers are eager to receive letters from the public. They need to fill the space.
- Politicians read this page to gauge public opinion on an issue. Some newspapers even provide a running tally of the number of letters they receive on an issue.
- Letters to the editor are the quickest and cheapest way to communicate your message to a wide audience.
- Letters must be short and simple and stick to one point. Keep your letter to a maximum of 200 words. Don’t ramble. If you have more than one point to make, write more than one letter!
- Write the way you talk and speak from the heart. Don’t try to impress the editor with big words and encyclopedic knowledge. They want passion.
- Don’t get personal. You can disagree with an opinion or action, but personal attacks distract from the point you are trying to make.
- Write the same day or the day after a story appears – the more current the topic, the more interest it will attract.
- Send a letter whenever you have an opinion. You can send two letters on two subjects on the same day.
- Always include your name, address and phone number. Most papers have a policy of phoning to verify authorship prior to printing.
- If you are sending your letter by e-mail, put it in the body of the e-mail, do not attach it. Most newspapers today do not open attachments.
- There’s strength in numbers – try to get others to write also.

HOW TO

SUSTAIN AND INCREASE

YOUR ADVOCACY EFFORTS

- Put elected officials on your mailing lists. Keep it updated!
- Invite elected officials to your events.
- Involve elected officials in groundbreaking, ribbon cuttings, committees and task force meetings.
- Acknowledge all elected officials and their position at every event, meeting or gathering where they are in attendance.
- Monitor their committee and legislative work, review agendas and, when possible, attend committee meetings.
- Give them credit whenever possible, but be sincere.
- Hold breakfasts or luncheons on particular issues and invite the elected official to speak.
- Occasionally invite elected officials to dinner with your board with no agenda other than to keep them informed.
- Attend events or meetings if you are requested.
- Offer to write an article for your legislator's newsletter.
- Sponsor a "Day on the Hill" for your members.
- Get to know and develop a working relationship with staff. • Leave your personal politics at home.
- Always say "thank you".
- Support those who support you.

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Gina Warner is the President of Strategic Solutions, New Orleans, LA., and the original author of Being A Player.

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info@ccednet-rcdec.ca

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The Canadian Community Economic Development Network (CCEDNet) is a member-driven, not for-profit, charitable organization made up of community-based organizations, co-operatives, social enterprises, practitioners, active citizens, researchers, and other organizations involved in community economic development (CED).

We work to strengthen CED in urban, rural, northern and Aboriginal communities across Canada, to improve social, economic and environmental conditions at the local level.

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