

#ALICEsummit

ADVOCACY FOR ALICE



PRESENTED BY

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BIGGEST MYTHS IN NON-PROFITS

- I'm a non-profit so I can't do advocacy.
- I'm a 501(c)(3) so I can't "lobby."
- I'm a non-profit, so I can't tell people to call and tell legislators something.
- I'm a non-profit, so I can't have anything to do with campaigns.
- I'm a non-profit, so I can't help register people to vote.
- I'm a non-profit, so I can't participate in Get-Out-the-Vote (GOTV) events.



MYTH
BUSTED



BIGGEST MYTHS IN NON-PROFITS

- I'm a non-profit so I can't do advocacy. *YES YOU CAN*
- I'm a 501(c)(3) so I can't "lobby." *YEP, YOU CAN DO THAT TOO*
- I'm a non-profit, so I can't tell people to call and tell legislators. *YES YOU CAN*
- I'm a non-profit, so I can't have anything to do with campaigns. *ON A LIMITED BASIS, YES YOU CAN*
- I'm a non-profit, so I can't help register people to vote. *YOU ABSOLUTELY CAN*
- I'm a non-profit, so I can't participate in Get-Out-the-Vote (GOTV) events. *AS LONG AS IT IS NOT PARTISAN OR FOR A PARTICULAR CANDIDATE, YES YOU CAN!*



OVERVIEW OF SESSION

- What are the rules for advocacy?
- How do you do successful advocacy?
- How do you measure success?



DEFINITIONS

- IRS Definitions:
 - 501(c)(3): Tax-exempt non-profit organization. Does not have to pay taxes on income, donors may deduct their contributions as charitable deductions. May conduct limited lobbying and political activity.
 - 501(c)(4): Tax-exempt non-profit organization. Does not have to pay taxes on income, however donors may NOT deduct their contributions as charitable deductions. May conduct unlimited lobbying and political activities under separate rules.



DEFINITIONS

- IRS Definitions:
 - **Direct Lobbying**: communication is one made to either a legislator, an employee of a legislative body, or any other government employee who may participate in the formulation of the legislation. It must refer to a specific piece of legislation and express a view on it.
 - **Grassroots Lobbying**: communication is an attempt to influence specific legislation by encouraging the public, other than the organization's members, to contact legislators about that legislation. It must refer to specific legislation, reflect a view on it and encourage the recipient to take lobbying action on it.



WHY THESE DEFINITIONS MATTER

- Under the IRS Definitions, there are separate expenditure limits for each.
 - **Direct Lobbying**: insubstantial part test for organizations who haven't made the 501(h) election;
 - If you have made the 501(h) election, the limits are as follows:
 - 20% of the first \$500,000 of exempt purpose expenditures, plus
 - 15% of the next \$500,000 of exempt purpose expenditures, plus
 - 10% of the next \$500,000 of exempt purpose expenditures, plus
 - 5% of the remaining exempt purpose expenditures up to a total cap of \$1 million



WHY THESE DEFINITIONS MATTER?

- Under the IRS Definitions, there are separate expenditure limits for each.
 - **Grassroots Lobbying**: insubstantial part test for organizations who haven't made the 501(h) election;
 - For those who have made the 501(h) election grassroots lobbying expenditures are limited to 25% of the organization's total lobbying limit using the guide on the previous slide.
 - Even if the electing charity spends very little or nothing on direct lobbying, it may still spend up to 25% of its limit for overall lobbying on grassroots lobbying.



A WORD ABOUT THE 501(H) ELECTION

- A 501(c)(3) that is not a church is eligible to make the 501(h) election.
- How do you do it? Fill out this form and then track your expenditures.

Form 5768 (Rev. September 2009) Department of the Treasury Internal Revenue Service	Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation (Under Section 501(h) of the Internal Revenue Code)	For IRS Use Only ►
Name of organization		Employer identification number
Number and street (or P.O. box no., if mail is not delivered to street address)		Room/suite
City, town or post office, and state		ZIP + 4
<p>1 Election—As an eligible organization, we hereby elect to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending _____ and all subsequent tax years until revoked. (Month, day, and year)</p> <p>Note: <i>This election must be signed and postmarked within the first taxable year to which it applies.</i></p>		
<p>2 Revocation—As an eligible organization, we hereby revoke our election to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending _____ (Month, day, and year)</p> <p>Note: <i>This revocation must be signed and postmarked before the first day of the tax year to which it applies.</i></p>		
Under penalties of perjury, I declare that I am authorized to make this (check applicable box) ► <input type="checkbox"/> election <input type="checkbox"/> revocation on behalf of the above named organization.		
_____ (Signature of officer or trustee)	_____ (Type or print name and title)	_____ (Date)

Download Form 5768 (Rev. 9-2009) from the IRS website. To make copies of this election return, use Form 5768-SS (Rev. 9-2009) as an instructed duplicate of Form 5768.



WHAT DOESN'T COUNT AS LOBBYING

- Nonpartisan analysis, study or research that presents all sides of an issue.
- Responses to written requests for assistance from committees or other legislative bodies.
- Challenges to or support for legislative proposals that would change the organization's rights or its right to exist.
- Examinations and discussions of broad social, economic, and similar problems.
- The IRS restricts lobbying to Congress and state Legislatures. You can speak to members of local school boards, police juries, metro councils, and any administrative body or administrative branch official (Governor, Superintendent, Secretaries of various agencies) and it is NOT considered lobbying by the IRS.



WHAT DOESN'T COUNT AGAINST YOUR EXPENDITURE CAP

- Volunteer and other efforts that do not cost the organization money will not count toward the exhaustion of the lobbying limits.
 - Facebook Posts
 - Volunteers Who Show Up to Lobby



GOING BACK TO THE MYTHS

- I'm a non-profit so I can't do advocacy.
 - Examinations and discussions of broad social, economic, and similar problems do not count as lobbying. You can provide reports, information, newsletters to legislators at any time.
- I'm a 501(c)(3) so I can't "lobby."
 - Either under the insubstantial test or the 501(h) election, you CAN lobby.
- I'm a non-profit, so I can't tell people to call tell legislators.
 - It's called Grassroots Lobbying and either under insubstantial test or 501(h) election you can!



NOW, ABOUT CAMPAIGNS...

- Here's what you can do with ballot initiatives:
 - Publicly endorse or oppose ballot measures;
 - Propose ballot measures;
 - Contribute money to ballot measure campaigns;
 - Loan money to ballot measure campaigns;
 - Host ballot measure campaign events at their offices; and
 - Register people to vote and encourage them to vote for or against a ballot measure.
 - Buying TV, radio, or newspaper ads to publicize the organization's views on the ballot measure
 - Allocating one page of the organization's four-page newsletter to urging readers to vote "no" on the ballot measure (one-quarter of the cost of staff time, printing, and mailing the newsletter counts as lobbying)
 - Contributions of money, property, or paid staff to a committee established to campaign for or against a ballot measure

All counts as lobbying either under insubstantial test or 501(h) election



NOW, MORE ABOUT CAMPAIGNS...

- Here's what you can do with ballot initiatives:
 - Researching the issues, conducting surveys of voter attitudes, and possibly even community organizing or holding conferences, so long as these activities are not primarily focused on the ballot measure and are not a form of preparation for lobbying.
 - Communications to the public that refer to the ballot measure, but do not reflect a view on it.
 - Communications to the public on the general subject addressed by the ballot measure, which do not refer directly or indirectly to the ballot measure itself.

Does NOT count as lobbying either under insubstantial test or 501(h) election



NOW, A LITTLE MORE ABOUT CAMPAIGNS...

- If it's a CANDIDATE for office, though...
 - Public charities are always prohibited from supporting or opposing candidates for public office.
 - Work on a ballot measure does not mean that it may also comment on candidates included on the same ballot.
 - An organization cannot use its support of or opposition to a ballot initiative as a way to indirectly support or oppose a candidate.
 - Even though the legislative measure appears on a ballot during an election, ballot measure work is a lobbying, not electoral, activity.



YOU CAN...

- Continue to advocate for the organization's issues during an election year
- Educate all of the candidates on public interest issues within the purview of the organization
- Criticize sitting elected officials, especially if the organization has a history of doing so
- Publish legislative scorecards*
- Conduct nonpartisan public education and training sessions about participation in the political process
- Prepare candidate questionnaires and create voter guides
- Conduct nonpartisan get-out-the-vote and voter registration drives
- Canvass the public on issues
- Sponsor candidate debates
- Work with all political parties to get its positions included on the party's platform



GOING BACK TO THE MYTHS

- I'm a non-profit, so I can't have anything to do with campaigns.
 - You can have a little bit to do with campaigns.
- I'm a non-profit, so I can't help register people to vote.
 - You can do this all-the-time as long as it is not partisan or based on support for an issue.
- I'm a non-profit, so I can't participate in Get-Out-the-Vote (GOTV) events.
 - As long as you do not advocate for a particular candidate or issue, you CAN!



HOW DO YOU MEASURE SUCCESS?

- Discuss Evaluation Expectations Early
- Develop Long-Term as well as Incremental Goals
- Use Benchmarks to Measure Outcomes, Progress, Capacity Building
- Use Benchmarks of Success that Target Relevant Audiences
- Tell the Story
- Make Use of Available Evaluation Resources
- Make the Evaluation Fit the Nature of the Advocacy Work Conducted



ADVOCACY IS YEAR-ROUND ACTIVITY

- Don't wait until the Legislative Session to start talking to Legislators and other Policymakers
- Cultivate relationships throughout the year
- Invite legislators to your events/gatherings
- Encourage volunteers to run for office
- Learn who is running for office and reach out to them about your organization
- Pay attention to the media and understand what issues your legislators are speaking about



DON'T BE AFRAID

- Know the rules and use them!
- Let your services support your advocacy.
- Ask for assistance when you are unsure.
- Doesn't have to be a lot of work, just little bits of work that happen often.



VOTE YES! FOR NOLA KIDS CAMPAIGN

Here's what to look for
on your **April 30th ballot:**

PW Early Childhood Education - 5 Mills - CC - 20 Yrs.

Shall the City of New Orleans be authorized to enhance early childhood development and education in New Orleans through the levy of a special tax of 5 mills on all taxable property within Orleans Parish for a period of twenty years (January 1, 2023 through December 31, 2042), with all tax proceeds dedicated exclusively to programs and capital investments that provide childcare and educational opportunities for Orleans Parish children who have not yet entered kindergarten, and with an estimated collection during the initial year of \$21,274,959 if the foregoing special tax is levied in full?

Yes No

 **Vote Yes!**
to fund the future of NOLA

EARLY VOTING:
April 16-23
(Excluding Sunday, April 17)

ELECTION DAY:
April 30



PowerCoalition.org/Vote



We Did It!
The New Orleans
Early Childhood
Proposition passed on
Saturday! **Thank you**
for saying **YES** for
NOLA Kids!

YES
FOR NOLA KIDS



PowerCoalition.org



THE C4 SPACE



Don't sit this election out.
LOUISIANA'S BABIES ARE COUNTING ON YOU.

EARLY VOTING IS NOV. 3 – NOV. 11
 (excluding Sunday 11/5, and Friday 11/10)

ELECTION DAY IS SATURDAY, NOVEMBER 18

PAID FOR BY ALLONS BABIES
 13609 Landmark Drive
 Baton Rouge, LA 70810

BARBARA REICH
FREIBERG
 STATE REPRESENTATIVE

BELINDA DAVIS

has consistently voted to support our state's youngest citizens so that they can get a quality education **FROM THE START.**

BESE awards \$30 million to ready start networks to kickstart LA birth to age 3 and expand access to high-quality early care and education
(LA Dept of Education, LA Believes; April 28, 2021)

BARBARA FREIBERG
received an **A GRADE**
on the Allons Babies
LEGISLATIVE SCORECARD:

BARBARA HAS DEMONSTRATED HER UNDERSTANDING OF EARLY CHILDHOOD POLICY AND CONSISTENTLY VOTED TO HELP OUR BABIES THRIVE. ✓

TO SEE DETAILS OF BARBARA'S VOTES, VISIT WWW.ALLONSBABIES.COM

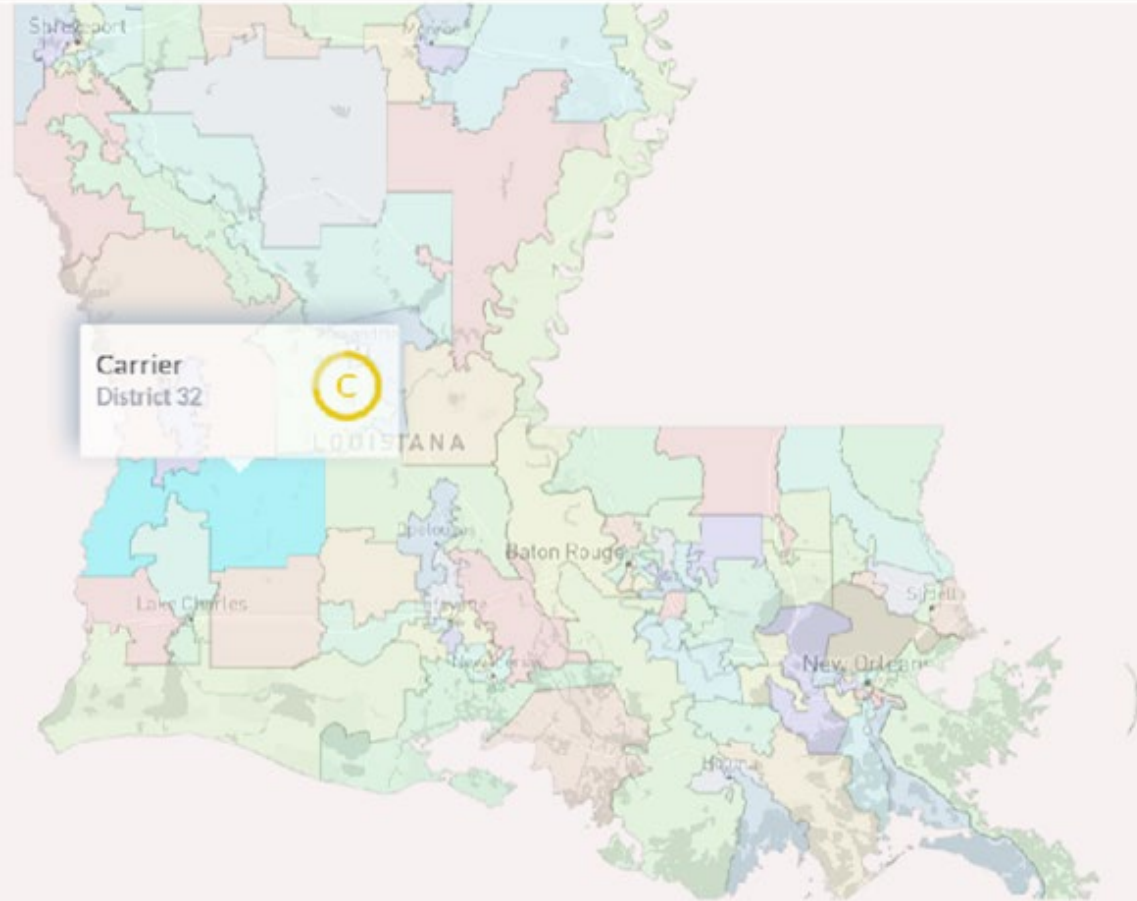




THE C4 SPACE



ALLONS BABIES
Legislative Scorecard.



www.allonsbabies.com



RESOURCES

<https://bolderadvocacy.org/resource-library/>

Practical Guidance: What Nonprofits Need to Know About Lobbying in South Carolina

Inside this Guide:

This Practical Guidance resource is designed to help your nonprofit organization determine if lobbying rules in South Carolina might apply to your state or local work. It includes:

- Summary of registration and reporting triggers
- Key takeaways for nonprofit organizations

Maximizing Your Advocacy

For Granting Unused Lobbying Capacity From a 501(c)(3) to an Affiliated 501(c)(4)

We're always helping nonprofits make smart strategic choices within the publishing a guide on how a 501(c)(3) and a 501(c)(4) can actually help each other's limitations.

How much lobbying a 501(c)(3) public charity can do. Despite those organizations find themselves at the end the year with unused lobbying

PDF

Relevant for:

Subject:

Administrative Agencies
Advocacy Capacity
Evaluating Advocacy
Affiliated Organizations
Influencing Legislation
Lobbying
Recordkeeping
State Law Resources

Organization Type:

501(c)(3)
501(c)(4)
Community Foundations
Nonprofits

PDF

Relevant for:

Subject:

Advocacy Capacity
Funding Advocacy

Organization Type:

501(c)(3)
501(c)(4)

Language

English

Published Date

12/15/2021

CONSENSUS BUILDING

View Entire United Way Of Florida Consensus Legislative



2024 CONSENSUS LEGISLATIVE AGENDA

MEET ALICE



In Florida, ALICE keeps our state's economic engine humming. ALICE, an acronym for Asset Limited, Income Constrained, Employed - the key word is "employed" - gives a name to nearly 33 percent of our state's population. These hard workers do not earn enough to support their own families and are regularly forced to make tough choices like deciding between quality childcare or paying the rent, which have long-term consequences not only for their families, but for all Florida's residents.

WE KNOW ALICE

While ALICE households exist across all demographic groups, the pandemic exposed and widened gaps in rates of hardship by race/ethnicity, age, and household composition. In Florida, White households are more likely to live below the ALICE Threshold, however the percentage is higher in households for other groups. Florida's youngest and oldest households have the highest rates of hardship with 71% of households headed by someone under age 25 and 53% of senior households living below the threshold.



ALICE AT WORK

In Florida, nearly 70% of jobs pay \$20 or less per hour but make up a majority of our workforce. Many of these positions were celebrated as essential heroes during the COVID-19 pandemic from working in childcare to healthcare to keeping us safe in our homes and workplaces, but they do so much more, including everything from staffing our state's robust tourism and retail marketplace to servicing the nearly 8 million automobiles owned by Floridians.



ALICE & INFLATION

The annual ALICE Household Survival Budget including only the basic costs needed to live and work in Florida, rose by 12% for a single adult, by 11% for a family of four with two small children in the most recent report. With the increasingly high rate of inflation, things continue to get worse for many.



ENGAGING PARTNERS

- Subject Matter Experts
- Non-profit Partners
- Individuals Served
- Volunteers



Why we're here and what we're advocating for.



FINANCIAL STABILITY

Help over 72,000 families and individuals within Florida's ALICE population, receive more than \$76 million in tax refunds, more than \$20 million in Earned-Income Tax Credits (EITC), and education tax credits for Floridans pursuing higher education.

- **INVEST** \$1.8 million to enhance opportunity for free tax preparation statewide in all 67 counties.
- **ENHANCE SERVICES** to underserved populations in the state's hardest-to-reach areas.
- **INCREASE CAPACITY**, while improving quality and accuracy.



HOUSING ATTAINABILITY

Identify and support opportunities to address attainable housing in our state. In collaboration with Florida's network of United Ways and many others, United Way of Florida was pleased to support the landmark Live Local Act (LLA) passed in 2023. We applaud the pivotal steps toward mitigating Florida's housing issues and continued effort.

- **FOCUS** resources on programs incentivizing the construction of affordable rental units.
- **SUPPORT** legislation that would expand access to home ownership programs.



BEHAVIORAL HEALTHCARE ACCESSIBILITY

Support efforts to expand behavioral healthcare access for Florida's ALICE (Asset Limited, Income Constrained, Employed) families, by increasing reimbursement rates for providers and enacting policy changes that promote workforce development.

- **INCREASE** reimbursement rates significantly for behavioral healthcare across the board which would help address these issues and improve access to care for more families.
- **ENHANCE** Florida's behavioral health talent pipeline.



CHILD CARE AFFORDABILITY

Support efforts to make childcare more affordable for Florida's ALICE families including increased eligibility for School Readiness and new tax incentives and exemptions for businesses that support access to childcare for employees.

- **INCREASE** initial eligibility of School Readiness to provide subsidies to make childcare affordable for low-income families.
- **CREATE** incentives for private sector investment.
- **SUPPORT** state investments to increase access to extended early learning programs.



EDUCATING POLICYMAKERS ON ALICE



Rep: District 27

REPRESENTATIVE STAN MCCLAIN

QUICK KEY

- Chair- Ways & Means Committee
- Occupation: State Certified Residential Contractor
- Florida Home Builders Association, current member
- Withlacoochee Regional Water Supply Authority, past member, Chairman, 2011

- Mention ALICE

ABOUT MCCLAIN

- Born in Virginia
- Lives In Ocala
- 11 Children
- 17 Grandchildren
- Served 2016-2024
- Recreation Interest Golf, Fishing and Youth Sports

BILLS INTRODUCED

- **Sponsored**
 - CS/HB 925 (Direct-Support Organization)
 - CS/CS/HB 1069 (Education)
- **Co-Sponsored:**
 - CS/HB 7 (Pregnancy and Parenting Support)
 - CS/CS/HB 657 (Enforcement of School Zone Speed Limits)

LEGISLATIVE AIDE

- Tallahassee: Ryan Thomas
- District: Jennifer Treiber

LOCATION

Tallahassee Office
 418 The Capitol 402 South Monroe Street
 Tallahassee, FL 32399-1300
 (850) 717-5027

District Office
 315 Southeast 25th Avenue Ocala, FL 34471-2689
 (352) 732-1313

COMMITTEE ASSIGNMENTS

- Education & Employment Committee
- Choice & Innovation Subcommittee
- Rules Committee
- Local Administration, Federal Affairs & Special Districts Subcommittee





EDUCATING POLICYMAKERS ON ALICE

ALICE: Focus on Families

Who is ALICE

OVER 100,000 Households in Volusia & Flagler counties are at or below the ALICE threshold

Meet A.L.I.C.E

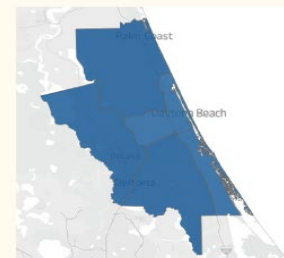
Asset Limited Income Constrained Employed

Impacts the Community

- Stressed Workers
- Future Burden on Education System
- Less productive student
- Students attend school sick



Volusia & Flagler
Over 60%
of Families are ALICE or Below
(92,781 Children)



96-100% of all ALICE families in **Flagler & Volusia** are rent-burdened.

Impact at Home

90% of ALICE families in Southeast and Northwest Volusia have restricted home internet

Access to Services

- Over 50% of ALICE families are not receiving SNAP
- Over 40% of ALICE families are not receiving Medical Assistance

How Can I Help ALICE?

- Mentoring
- Sponsor Training
- Access to Home Internet
- Paid Days Off
- Flex-Time
- Telecommuting Options
- Tax Credits
- Child Care Vouchers
- Education Vouchers

Learn more:





ALICE LEGISLATIVE DISTRICT TOOL

Exploring Financial Hardship by District

While the Federal Poverty Level is the basis for many public programs, looking at poverty alone excludes the 36.3 million households in the U.S. who are **ALICE** (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed), earning above the poverty level but below the basic cost of living in their communities.

This interactive tool helps policymakers and community stakeholders better understand how many households are actually struggling in their district.

► How to Use This Tool

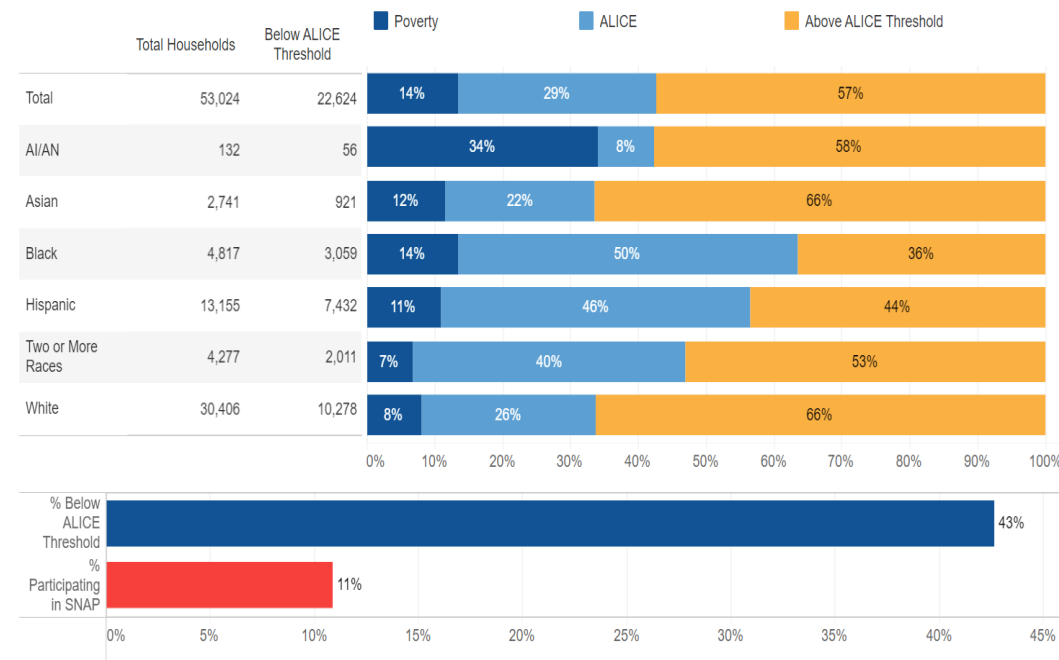
Not sure where to look? [Find your district](#) by address or current location.

Select Partner State: Legislative Districts (State or Federal): Select District:

Visit ALICE Legislative District Tool Here:



State House District 37, Florida





WHAT'S YOUR BROWNIE?





CONTACT INFORMATION

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JOIN THE CONVERSATION

#ALICEsummit

@United4ALICE