



## Building an Effective Electoral Advocacy Plan

Do you believe everyone should have the opportunity to vote but don't know to help make that happen? Do you worry that encouraging civic engagement might affect your 501(c)(3) status? Do you want to make sure people in your organization and in your community have the information they need to make their own decisions before, on and after election day? If the answer to any of these questions is “yes,” then you want to engage in electoral advocacy, and this tool will help you achieve your goals.

501(c)(3) organizations can engage in electoral advocacy—that is, performing advocacy efforts that do not support or oppose a specific candidate or party. This is one type of advocacy, the umbrella term for identifying, embracing, and promoting a cause. Often advocates will work to educate candidates for office about their issues in hopes of building a relationship that may translate to support once the candidate is elected. That work, even though it may be done during an election season, is just like building a relationship with any other elected official. Electoral advocacy can be specific to an issue, usually to encourage voters to reject or approve a ballot initiative on Election Day. Electoral advocacy also can be used to describe activities encouraging citizens to participate in the democratic process by registering and voting. Nonprofits who want to educate voters about their issues and encourage people to register and vote can do so—and should!

No matter your intent, you need a cohesive plan to be successful. This guide details a four-step process that will help you build your plan.

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## 501(c)(3) Advocacy Activities

Do's	Don'ts
Nonpartisan Election Activities	Partisan Election Activities
<p><b>Voter Education</b></p> <ul style="list-style-type: none"> <li>✓ Help new voters understand elections and the voting process</li> <li>✓ Sponsor nonpartisan candidate forums or debates subject to limits on lobbying</li> <li>✓ Distribute nonpartisan questionnaires to candidates</li> <li>✓ Distribute nonpartisan materials on ballot measures</li> <li>✓ Distribute nonpartisan materials regarding all candidates or regarding election process</li> <li>✓ Attend town halls or other forums to raise awareness about the importance of your issue</li> </ul> <p><b>Candidate Engagement</b></p> <ul style="list-style-type: none"> <li>✓ Provide briefings to all candidates on the organization's issues</li> </ul> <p><b>Lobbying</b></p> <ul style="list-style-type: none"> <li>✓ Direct lobbying activities</li> <li>✓ Grassroots lobbying activities</li> </ul>	<p><b>Show Favoritism</b></p> <ul style="list-style-type: none"> <li>✗ Endorse/oppose a candidate</li> <li>✗ Rate candidates on their support of an issue (through a report card, rating card, etc.)</li> <li>✗ Publicize which candidates share the nonprofit's views</li> <li>✗ Make positive or negative comments about a candidate or issue at events or in publications (e.g., board meeting, newsletter)</li> <li>✗ Ask a candidate to pledge support for a cause</li> <li>✗ Compare and contrast candidate's positions to your organization's views</li> </ul>
<p><b>Broad Voter Participation</b></p> <ul style="list-style-type: none"> <li>✓ Encourage and help people get to the polls on Election Day</li> <li>✓ Register people to vote</li> </ul>	<p><b>Voter Preference</b></p> <ul style="list-style-type: none"> <li>✗ Targeting/registering voters for only one party</li> </ul>
<p><b>Can Spend Resources</b></p> <ul style="list-style-type: none"> <li>✓ Activities that do not support a single party or issue</li> <li>✓ Voter registration</li> <li>✓ Voter education</li> <li>✓ Get Out the Vote</li> </ul>	<p><b>No Nonprofit Resources</b></p> <ul style="list-style-type: none"> <li>✗ Contribute or spend money to endorse/oppose a candidate</li> <li>✗ Raise money for a candidate</li> <li>✗ Let candidates use office space, equipment, mailing lists, etc.</li> </ul>
<ul style="list-style-type: none"> <li>✓ Direct lobbying (within the limits of the IRS, state, and local laws)</li> <li>✓ Ballot initiatives</li> <li>✓ Grassroots lobbying</li> </ul>	

## Step 1: Set the Stage

Before diving into electoral advocacy, you need to assess relevant internal and external factors that will affect your work. Answer the following questions as you consider your work in this arena.

### Inside Influences

1. Why does your organization want to engage in electoral advocacy? Is advocacy something you already do as part of your work, or would you be taking on a new scope of work?
2. How many staff members will be working on electoral activities? How much time will each person dedicate?
3. How much total time does your organization plan to commit to these activities?
4. What is your organizational budget for electoral activities?
5. Will you engage other organizations to work with you on these activities?
6. What, if anything, has your organization done in past election years?
7. What are some successes and lessons learned from your previous electoral activities that you can apply to future activities? What have you learned from the electoral activities of others that you can apply to your future activities?

If you are confident you have the staff capacity and financial resources to conduct electoral advocacy activities, keep going! If not, take some time to discuss internally where electoral advocacy is prioritized against other organizational activities and if you can secure the necessary time and funds to do this work now. If you are unable to take this on right now, consider ways your organization can support—either through donated time or donated money—other local organizations who are well-versed in electoral advocacy.

### Outside Influences

Internal capacity and commitment are critical, but you also need to consider the external factors that will influence your success. The following questions can help.

1. What upcoming ballot initiatives are relevant to your work (e.g., school, library, health and human services levy, etc.)? Once again, highlight or mark 1–2 that are most important to your work.
2. What organizations/agencies currently champion your issue? Are they doing electoral advocacy? These may be allies with whom you can work.
3. How do other “hot” political topics relate to your issue? Consider whether these attention-commanding issues have the potential to help or hurt your advocacy.
4. Who are your key stakeholders? Do you expect them to participate in your electoral activities? If you have an engaged membership base or Board of Directors, these individuals may provide additional capacity to complete your activities, particularly over a short period of time.
5. What other current events or political issues may positively or negatively affect your advocacy work?

This kind of thoughtfulness at the start will serve you well as you move into the planning phase and select the strategies and tactics on which you will focus over the upcoming weeks and months. Think about the answers to these questions as a “filter”—prioritize activities that will not only further your mission, but also help with sustainability, be enthusiastically supported by key stakeholders, and are realistic to achieve within the current political context.

## Step 2: Create an Action Plan

Now that you have had important “reality check” conversations, you are ready to dive into creating an action plan. Use the questions below to complete your comprehensive action plan on the following page.

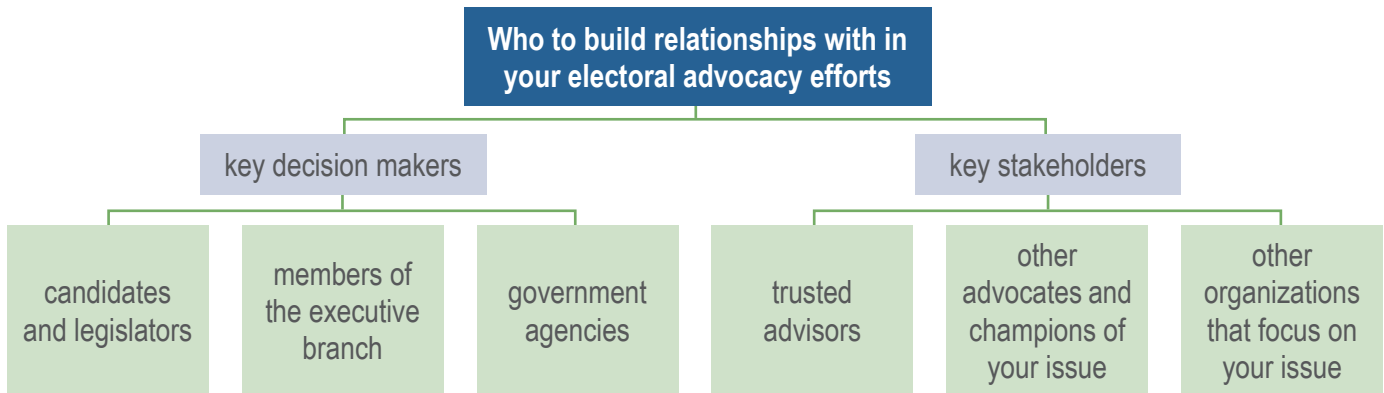
- 1. What is your goal?** Setting a goal is important to building an effective strategy. A goal should represent what your organization ultimately wants to accomplish at the end of your electoral advocacy effort. It will guide every step in the process. For example, an electoral advocacy goal could be, “Pass the library levy.”
- 2. Who are the target audiences?** The target audience is the group of people your communication and advocacy efforts are geared toward. Using the example above, your primary target audience is residents who will see the ballot initiative on their ballots and who might use the library. Maybe based on your other work you will want to get more specific, so perhaps your true target audience is families with young children, because you already know their needs, where to reach them, and that they benefit from a strong library. Target audiences cannot be everyone; they must be tailored groups or groups that can help you meet your goal.
- 3. How will you reach your target audiences?** Where do individuals in these audiences get their information? Where do they spend their free time? Whom do they trust? If your target audience is parents, the best way to reach them might be through Facebook groups, local places where families interact, or Get Out the Vote events. You can get creative and look for free or low-cost opportunities to reach people where they are.
- 4. What are you going to tell them (message)?** Your message needs to explain the who, what, how, and why in relation to your goal. If your goal is to gain support for the library levy, your message might be: (Why) Libraries are a trusted, non-partisan public resource available to everyone. (What) Increasing funding support for libraries means they can provide high quality and up to date educational and fun materials and programs for every family. (Who) Libraries offer something for everyone, at every age, and librarians are always available to help you find what you need. (How) By voting “yes” on the levy, you are ensuring a strong library for you and future generations.

### What’s Legal?

**Before moving forward, you must be aware of what your 501(c)(3) can and cannot do during an election year under the federal law. Nonprofits can spend resources on voter registration, voter education, Get Out the Vote activities, direct lobbying (within IRS and legal limits), and ballot initiatives, as long as they do not support a single party. Nonprofits cannot contribute money to or spend money on endorsing or opposing candidates, raise money for a candidate, or let candidates use their space, equipment, or contacts for campaigning.**



5. **How will you reach your goal (strategies)?** Strategies are the ways in which goals are achieved. In the example of the library levy passage, a key strategy would be voter education about the ballot initiative.
6. **What are the specific actions you need take under each strategy?** Often called “tactics,” this is where you start to get into the nitty-gritty. Let’s say you have selected voter education as a strategy to support your ballot initiative goal. Tactics might include social media ads about the impact of the ballot initiative and a mailing campaign to voters’ homes about the ballot initiative.
7. **Are there partnership opportunities?** Time and resources often are limited in the nonprofit world. This is a good point in the planning process to revisit the list of champions from Step 1 and consider working together to achieve shared goals. Perhaps you can partner with other entities to organize a town hall meeting, create materials to send to candidates to request their support for a ballot initiative, or co-fund a voter education campaign.



**1. What is your goal?**

Goal: \_\_\_\_\_

**2. Who are the target audiences?**

Primary: \_\_\_\_\_

Secondary: \_\_\_\_\_

**3. How will you reach your target audience?**

**4. What are you going to tell them (message)?**

Who: \_\_\_\_\_

What: \_\_\_\_\_

Why: \_\_\_\_\_

How: \_\_\_\_\_

**Bring it all together:**

What is the call to action (in other words, what can the person hearing your message do?). This might be as simple as “Visit website X to learn more.”

Who from your own organization should you train on messaging? (Hint: the more people who know the message the better.)

**5. How will you reach your goal (these are your strategies)?**

1.

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2.

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3.

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**6. What are the specific actions you need take under each strategy? (These are your tactics)**

Strategy	Tactic	Deadline	Person Responsible

**7. Are there partnership opportunities?**

Which organizations can you work with? \_\_\_\_\_

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How can you support each other? \_\_\_\_\_

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**Step 3: Time it Out**

In your action plan, assign deadlines/timelines to your strategies and tactics. This is important to ensure you will meet your goals in a timely fashion. To help you think this through, below is a sample timeline; this should be used as a guide to thinking about how to develop your own.

*Example Strategy: Get community leaders/influencers to publicly support the library levy.*

▶ **June**

Identify and reach out to 10 community leaders and influencers and introduce yourself, your organization, and the importance of your issue.

▶ **July**

Ask the leaders/influencers to become public supporters of the levy campaign, such as by serving on an honorary committee or a list of local supporters.

▶ **August**

Invite leaders/influencers to participate in story time at the library and invite media to a short press conference after to reinforce their support.

▶ **September**

Hold a voter education forum at a library.

▶ **October**

Conduct a three-week Get Out the Vote campaign leading up to the election.

▶ **November**

Election Day!

#### **Step 4: Assess Your Progress**

Part of having a successful electoral advocacy strategy is knowing what success looks like. Before you begin, define what successfully reaching your goal means. After you build your strategy, go back and determine some indicators that will show success along the way. Use these benchmarks to make sure you are on your way to achieving goals. See the table below for examples of items to track.

Goal	Measurement
Raising public support for a ballot initiative.	Number of social media followers Number of survey respondents who commit to voting “yes” Attendance at events about the initiative
Bringing your issue to the forefront of the political agenda during an election.	Number of media mentions Number of events with candidates in attendance Number of meetings with candidates