Association of Fundraising Professionals

CAPITOL HILL VIRTUAL LOBBY WEEK

APRIL 26 - 30, 2021

CHAPTER TOOLKIT

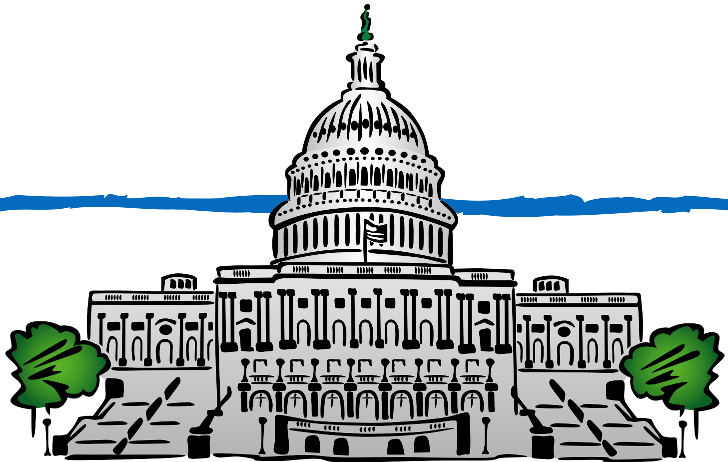
INTRODUCTION

AFP Global is asking every U.S. chapter to hold online meetings with at least one of their members of Congress during the week of **April 26 - 30**. Why?

- To advance key legislation like the universal charitable deduction and the IRA Legacy Act that will increase charitable giving and help fundraisers perform their job more effectively;
- To position AFP as a resource for members of Congress and their staff;
- To develop relationships between AFP chapters and members of Congress;
- To engage members in the chapter and the public policy process; and
- To show the value of AFP membership in a unique way.

PROCESS OVERVIEW

- Receive the toolkit (this very document!) and review it
- Designate a chapter government relations chair or other position to head up Virtual Lobby Week
- Identify which members of Congress you're going to meet
- Begin to identify chapter members interested in participating
- Make contact with the Congressional offices
- Schedule meetings (let AFP Global know through our online form)
- Plan for each meeting
- Receive fact sheets from AFP
- Attend scheduled meetings
- Follow up after the meetings



Have questions about
Virtual Lobby Week?

Just ask! For questions or comments, please email **paffairs@afpglobal.org**.

TOOLKIT CONTENTS

This toolkit contains everything you need to schedule, prepare for and hold a meeting with members of Congress and/or staff, including:

- Rules on lobbying to assure you that, yes, you and all your chapter members can lobby and participate in these meetings!
- Step-by-step process for scheduling a meeting;
- Tips on preparation and how to think of this as a donor meeting;
- Guidance on what to say during a meeting;
- Ideas on how to follow-up after the meeting;
- Schedule for preparation webinars/Zoom calls where we will go over Lobby Week and engage in mock role-playing meetings.

If you have any questions about this toolkit or any aspect of your meetings with members of Congress, please feel free to contact AFP's Public Affairs Department at **paffairs@afpglobal.org.**

YES, YOU CAN!

Given that you work for a charitable organization, you might be worried about whether you can legally participate in lobbying activities.

The good news is, yes, you can, unequivocally.

You're attending these meetings as a member of the Association of Fundraising Professionals. AFP is a 501(c)(6) professional association under the Internal Revenue Code. From the IRS's Exempt Organizations - Technical Instructions Manual, "Organizations described in IRC 501(c)(4), (c)(5), and (c)(6) may engage in an unlimited amount of lobbying, provided that the lobbying is related to the organization's exempt purpose."

Lobbying and advocating for fundraising incentives and related issues is directly related to AFP's purpose, so these meetings are covered under the law.

YES, YOU CAN! CONT.

But maybe you're still worried. What if you start talking about the impact of a proposal on your organization, or you begin discussing the chapter, both of which are 501(c)(3) groups? Those are natural questions that arise during a meeting, and you're still covered under the AFP 501(c)(6) rules.

However, just in case, there's this: Federal tax law has always permitted some lobbying by nonprofit 501(c)(3) organizations, though there are limits. The 1976 lobbying tax law passed by Congress made that expressly clear. There are a couple of different regulations about lobbying by charities—and AFP Global is happy to have an in-depth conversation—but participating in a few meetings isn't going to jeopardize your organization's or your chapter's tax-exempt status in any way!

So, yes, you can lobby. And you should.

Federal law encourages it. Our system of democracy encourages it. And so does AFP Global! Members of Congress hear from charities, associations and other groups all the time—through phone calls, emails, meetings and other lobby days and events. We need to get out there and have our voices heard—and that's what AFP Virtual Lobby Week is all about!

PREPARING FOR A VIRTUAL LOBBY WEEK VISIT

To get started, AFP Global encourages chapters to designate a government relations chair or similar board position to head up the visits. Discuss with your chapter board or other leaders about how many visits seem realistic and appropriate. In a populous urban area, or with a chapter that is geographically large, there may be several representatives you could visit in addition to your two U.S. senators.

Also, discuss how many members of the chapter want to participate, which will help determine how many meetings you schedule. You don't need a lot of people in each meeting—we recommend six at the most. So even small chapters can schedule a few visits since not a lot of members are needed.

PREPARING FOR A VIRTUAL LOBBY WEEK VISIT, CONT.

Finally, discuss what meeting technology you might use and who will provide it. It's likely that the member of Congress' office will want to use their own system, but not always, so have your own ready.

Key Point: *Only schedule meetings with members of Congress with whom your chapter members are constituents—whether they live in the district or their organization is located in the district. Do not try to schedule a meeting with a member of Congress that might be close by and influential but for whom none of your members are constituents. They won't be interested, and it will be a waste of your time.*

SCHEDULING THE MEETING

When you're ready to start scheduling meetings, find the D.C. phone number for the member of Congress and make the call to that office. Explain who you are and whom you're representing (the Association of Fundraising Professionals), and be sure to emphasize that you are a constituent. Request a meeting with the representative or senator to discuss legislative issues around charitable giving—be specific if asked. Then ask to whom the meeting request email should be sent and obtain that email address.

Then, send a formal email requesting a meeting with the member of Congress and/or their staff. You can use the sample email below, which should include an offer to use Zoom or another technology platform (the office may respond that they'd rather use their own, which is fine) and what specific issues you'd like to discuss.

A productive meeting can happen regardless of technology, but it is one additional step to iron out when planning a virtual lobby visit.

Key Point: *If you don't hear back in a few days, follow up with an email or phone call. If the member of Congress is unavailable, always request to meet with the staff member who works on the issue.*

TEMPLATE EMAIL FOR MEETING REQUESTS

Dear [Name],

As a member of the Association of Fundraising Professionals (AFP) and as a constituent of [Senator X / Representative X], I would like to request a virtual meeting with the [Senator / Representative] on [date and time] to talk about charitable giving and fundraising issues, including the universal charitable deduction and the IRA Legacy Act. If the [Senator / Representative] is unavailable, I would like to meet with the appropriate staff member who covers these issues.

AFP is the largest community of professional fundraisers in the world, representing individuals who raise funds for a wide variety of charitable organizations through direct mail, major gifts, planned giving, online fundraising and many other methods. We are dedicated to advancing ethical and effective fundraising, and our work is bound by the strictest code of ethics in the profession.

I will be joined by [X] of my colleagues who all work for and/or represent different charities in [your district/the state]. We are happy to provide [a Zoom link/whatever technology the chapter can provide] if you would like or use whatever technology system your office would prefer.

Please contact me at [phone number and email] to follow up and if you have any questions.

Thank you for your consideration, and we look forward to visiting with you and the [Senator/Representative].

Key Point: *Each state has two U.S. Senators. We encourage chapters in the same state to coordinate meetings with their senators together, so senators and their staff aren't holding the same meetings over and over again. AFP Global can provide contact information for each chapter. Ideally, each chapter should choose one or two representatives, depending on the number of chapters in the state, to attend these meetings (keeping in mind that it's best not to have more than six people in one meeting).*

PREPARATION AND PLANNING

Once you have your meetings scheduled, it's time to start planning and preparing.

First, make a note to follow up with the staffer a few days before the meeting to confirm the time and technology. If the people attending have changed, keep the staffer informed. Be aware that some staff will request a list of attendees prior to the meeting.

Key Point: *In your follow-up email, you should also provide documents about AFP and our issues to the staffer. This will allow the staffer to understand who you are and what you're talking about and to prep the member of Congress if they are attending. These documents should include:*

- *Fact sheet about AFP*
- *AFP Code of Ethical Principles and Standards*
- *Fact sheet about the universal charitable deduction*
- *Fact sheet about the charitable IRA rollover and the IRA Legacy Act*

AFP will provide the above fact sheets (and possibly more, depending on what other issues arise) prior to your meetings.

Feel free to add a fact sheet about your chapter.

Second, let AFP Global know about your meeting. Complete this online form for each meeting. This will allow us to keep track of which chapter is visiting which member of Congress and ensure you receive all the documents and fact sheets you need for your meetings.

Third, begin working with the board and chapter members to select who will attend each meeting, keeping the number of participants to a maximum of six, and preferably four or five. Ideally, you want to select the participants before scheduling the meeting, but getting the meeting is the most important part.

Key Point: *It's always great to include participants who have some previous contact or a relationship with the member of Congress or the staff person, but this is not necessary. Getting bio information about the member of Congress and/or the staffer is also a good idea. These can typically be found on the member's website, or you can ask the staffer for a bio.*

SAMPLE MEETING STRATEGY

Developing a rough script for each meeting is a good idea. Determining who will say what and in what order can help make the meeting go more smoothly. Assign each participant one issue—it could be general information about AFP, ethical fundraising, a particular piece of legislation, or anything else that seems relevant. If a bio for the Congress member has been obtained before the meetings, this may help decide who will speak about each issue.

We recommend chapters think about who will:
- Start the meeting;
- Be responsible for technology before and during the meeting (if needed);
- Take notes;
- Lead discussion about issues;
- Talk about AFP, ethical fundraising and the work of a charitable fundraiser.

For example, five members of a chapter are discussing their upcoming visit:

Aaron: Chapter government relations chair, works for local arts organization, set up the meeting
Betty: Works for local college
Cathy: Works for community health foundation
David: Private consultant
Elizabeth: Works for religious institution

These members are meeting with their local U.S. representative. They asked for the representative's bio in advance and found that he spent two years studying at the college for which Betty works, and in the past, has served on the board of several arts organizations.

SAMPLE MEETING STRATEGY, CONT.

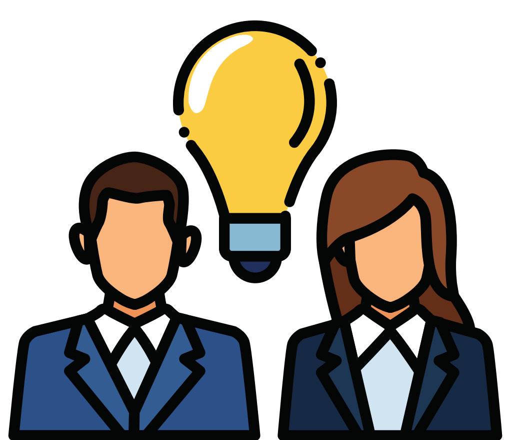
Elizabeth is taking notes and handling technology should anything happen during the meeting. Since Aaron set up the meeting, he'll start the discussion and get everyone introduced.

Because the member of Congress attended Betty's college, she'll go next and talk about AFP, ethical fundraising and the daily work of a charitable fundraiser. This will help to "break the ice" and create a positive atmosphere for the rest of the meeting.

Once the official has a fair understanding of AFP and the profession, the group will move discussion toward legislative issues. Cathy would benefit greatly from donors being able to roll over funds from their IRA to a charity. Other members will also offer their testimonials about how such a bill would benefit their organizations. When they begin to talk about the non-itemizer deduction, David will lead this part of the conversation based on some work he has done for some clients.

The group decides that this rough outline is sufficient. If the official responds positively to the group, Aaron will include in the thank-you letter an invitation to speak at a chapter function.

Key Point: *The overview about AFP, ethics, and the work of a charitable fundraiser may not take too long but are important issues to discuss since many members may not be aware of AFP and our emphasis on ethical fundraising. Most will likely have some idea of what a fundraiser does, but not necessarily those who work in the charitable sector. Therefore, this "table setting" for the meeting is critical, just as one might do with a major donor before talking about an actual gift.*



MEETING TIPS AND GUIDELINES

Meeting day is here, and you're waiting for it to begin. Here are a few tips to think about when you're in the meeting.

- **Be prepared.** If possible, have the Zoom or other meeting ready to go ahead of time and have all the chapter participants there. But be prepared to wait, especially if you're meeting when Congress is in session.
- **Be on point.** In the end, as with a donor meeting, it's all about the ask. What is the specific ask, and what specific action is being asked of the member of Congress?
- **Be friendly but focused.** Break the ice and talk about AFP. If possible, be sure to thank the member of Congress and/or staffer for something—a vote, a position on an issue, a speech, a visit, etc. Enjoy the conversation, but also get to the point and don't waste a lot of time. Thirty minutes is generally the most time you will have.
- **Be mindful of with whom you're speaking.** In general, lawmakers tend to be interested in the basic story of your concerns, not the details. A few statistics and a couple of anecdotes will usually be all they need. On the other hand, many staffers may be quite knowledgeable about issues and will want to hear more specific explanations.
- **Be polite.** If the member of Congress or staffer does not agree with your positions, find out why. Try to come up with a counter-argument, but don't push too hard. Never argue, threaten or deliver ultimatums. Such behavior will only work against you and your position. Remember, an opponent on one issue may be your closest ally on the next.
- **Be informative.** Do not assume that legislators are familiar with nonprofits. Share your professional knowledge and personal experience. Convey to members the value of AFP and nonprofits in the communities in which they serve. Talk about constituents of the member of Congress who have been helped or served by your charity.
- **Be honest.** If you do not know the answer to a question, say so. It is important to establish and maintain credibility. Commit to finding out the answer. After the meeting, respond as soon as possible to the member of Congress or staffer in writing.

MEETING TIPS AND GUIDELINES, CONT.

- **Be flexible.** You may not be able to meet with the member of Congress when you thought you were. Meetings may get cut short because of Congressional votes. Maintain a professional and informative demeanor and continue to articulate the message you've prepared.
- **Be a fundraiser.** Use the storytelling and conversational skills you have developed from conversations with donors. Ask questions and listen. Inspire them about what could be, especially with their support. Show them the impact of fundraising and charities, and then connect that to the legislation and proposals we're pushing for.

FOLLOWING UP AFTER MEETINGS

You had a successful meeting. Congratulations! You've helped advance some important legislation for the fundraising profession and increased awareness of the work of AFP and your chapter. And you're almost done!

First, debrief immediately after the meeting if possible, with whichever members can stick around—though be sure the member of Congress and/or staffer are off the call first (it's happened!). Review any positive and negatives and be sure to identify any commitments or follow-ups that need to take place (providing more information, text of a bill, other cosponsors of a bill or other request). AFP Global staff can help out with any requests.

And, of course, as with any donor meeting, **a thank-you letter is critical**. We recommend an immediate thank-you email to the staffer, then follow with an actual written letter to the member of Congress. If you worked with a scheduler in the office, be sure to thank them too.

Finally, let AFP Global know how the meeting went. Please send your notes to **paffairs@afpglobal.org**.

FURTHER FOLLOW-UP

Cultivating strong relationships is key. The process for engaging your elected official in activities after your visit is very much the same as trying to set up a meeting with them. You will need to call their office and be persistent. Some ideas to strengthen a connection with your member of Congress include, but are not limited to:

- Invite the member of Congress to speak at a chapter meeting or National Philanthropy Day event.
- If the member of Congress has been particularly supportive of legislative proposals and/or has expressed public support for your policy concerns, you might consider giving an award to them.
- Ask them to create proclamations for certain chapter events.

Keeping the official involved with your chapter is the best way to create a strong relationship that will help the chapter, AFP, and the profession in the future.

SCHEDULE

- **February:** Identify a chapter government relations chair or other position to head up Virtual Lobby Week activities.
- **February:** Identify which members of Congress the chapter will visit. Begin to coordinate with chapters in the state if interested in meeting with U.S. senators.
- **February:** Begin to identify chapter members who are interested in participating in meeting with their members of Congress.
- **March:** Finalize roster of chapter members for each meeting.
- **March:** Receive fact sheets and other documents from AFP Global to use in the meetings.
- **Mid-Late March:** Contact Congressional offices and set up meetings with members of Congress.
- **Early April:** Ensure all meeting participants have been identified, and each has been assigned a task or issue for the meeting.
- **April 19 – 23:** Attend AFP Global webinar/Zoom discussions to prepare, note any last-minute policy changes and run through/roleplay meeting situations. (Optional, exact dates and times to come)
- **April 19 – 23:** Send confirmation email to staffer, including one-pagers and other documents.
- **April 26 – 30:** Virtual Lobby Week meetings! Inform AFP Global of how the meeting(s) went.
- **May 3 – 7:** Send thank-you emails and letters. Begin any follow-up requests from meetings.