

AFP Chapter Advocacy Week Training

June 29, 2026



afpglobal.org



A woman with short brown hair, wearing a black and white patterned dress and black heels, stands on the wide stone steps of the U.S. Capitol building. The building's iconic white dome and classical columns are visible in the background under a clear blue sky.

AFP Advocacy Week 2026

August 3–7, 2026

Sally Schaeffer, President, Uncorked Advocates, Federal Lobbyist for AFP Global

Preparing AFP members and volunteer advocates for successful meetings with Members of Congress during the August district work period — and helping Congress strengthen charitable giving across America.

Why Advocacy Matters in 2026

This has been one of the most significant years for charitable policy in decades.

through OBBBA, and new bipartisan opportunities are emerging to expand giving even further.

Congress enacted important charitable tax changes

Legislative Momentum

OBBBA made meaningful progress — additional improvements are now within reach with the right advocacy.

New Opportunities

Bipartisan support for charitable giving is growing, such as the Charity Parity Act.

Sector Under Scrutiny

The Administration is proposing significant changes affecting nonprofits — our voice in Congress matters now more than ever.

You Are the Messenger

AFP members are the trusted local voices lawmakers need to hear from. If we don't tell philanthropy's story, someone else will.

Agenda

Here's what we'll cover today to prepare you for powerful, productive conversations with your Members of Congress.



Why Advocacy Matters

The stakes for charitable giving policy in 2026



Preparing for Meetings

Research, scheduling, and logistics



Charity Parity Act

AFP's primary legislative priority and your ask



Philanthropy Caucus

House members only — secondary ask



Telling Your Story & Tips

Meeting flow, best practices, and AFP resources

Why Advocacy Week?

Advocacy Week is AFP's annual effort to bring the philanthropic community directly to Capitol Hill — and to congressional district offices across the country. Your presence and your story make a difference that no lobbying firm can replicate.



Meet with Your Delegation

Schedule meetings with your Representative and both Senators — in-district or virtually. Every conversation counts.



Build Lasting Relationships

Congressional relationships are built over time. Advocacy Week opens the door to year-round dialogue with lawmakers and their staff.



Share Philanthropy's Impact

Help your lawmakers understand how charitable giving strengthens your community — in concrete, personal terms they'll remember.



Advance AFP's Priorities

Carry AFP's federal policy priorities forward — from the Charity Parity Act to caucus membership — with a unified, credible voice.

Success from Last Year's Lobby Week - Universal Charitable Deduction Returns... Permanently

Starting in 2026, non-itemizing taxpayers can claim a permanent above-the-line deduction for charitable gifts:

Individual Filers

Up to \$1,000 deduction for single taxpayers who do not itemize.

Joint Filers

Up to \$2,000 deduction for married couples filing jointly who do not itemize.

This reinstated and **permanent deduction** creates an opportunity to engage the 90% of Americans who do not itemize, potentially expanding your donor base and fostering a democratization of giving.

Experts predict 8M more Americans will now give — raising at least additional \$4B/year to charities.

Why This Matters to Fundraising

Advocacy and fundraising aren't separate disciplines — they are deeply interconnected. Every hour invested in advocacy directly strengthens the environment in which you raise money.



Protects the Charitable Deduction

The universal deduction exists because advocates fought for it. Without continued engagement, these provisions could erode or expire.



Protects Nonprofit Independence

Advocacy ensures that regulatory changes respect the autonomy and operational freedom nonprofits need to serve their missions.



Signals Professionalism to Donors

Donors respect organizations that engage in the policy process. It demonstrates sophistication, seriousness, and long-term thinking.



Stabilizes the Fundraising Environment

Consistent advocacy creates a predictable policy landscape, making it easier to plan campaigns, set goals, and build donor pipelines.

"Advocacy isn't separate from fundraising. **It protects it.** "

AFP's 2026 Advocacy Priorities

Every meeting should be focused, respectful of the Member's time, and anchored in these clear priorities. Lead with the primary ask, then layer in secondary topics as time allows.

1

Primary Ask — All Members

Support the Charity Parity Act. Ask your Representative and Senators to cosponsor this bipartisan legislation to modernize and expand charitable giving rules for senior donors.

2

Secondary Ask — House Only

Join the Congressional Philanthropy Caucus. If your Representative is not already a member, invite them to join this bipartisan caucus co-chaired by Rep. Blake Moore (R-UT) and Rep. Danny Davis (D-IL).

3

If Time Allows — All Members

Raise awareness of proposed OMB grant regulations. AFP Global is weighing in on this proposal, which could increase administrative burden and create inconsistent requirements for nonprofit grantees.

Preparing for Congressional Meetings

Getting Organized

Successful meetings don't happen by accident. A little preparation goes a long way in making a lasting impression on lawmakers and their staff.

- Decide who will participate from your chapter or organization
- Coordinate with your AFP chapter for scheduling support
- Schedule virtual or in-person meetings early — August calendars fill fast

Before You Walk In the Door

- Research your Member's committee assignments and priorities
- Check whether they already cosponsor the Charity Parity Act
- Learn whether they are already a Philanthropy Caucus member
- Review AFP leave-behind materials and talking points
- Practice your personal story — keep it to about 90 seconds

- ❏ Every meeting matters — including meetings with staff. Relationships with legislative aides often outlast the Members themselves.

The Charity Parity Act

AFP'S PRIMARY LEGISLATIVE PRIORITY

The bipartisan **Charity Parity Act** would modernize the rules governing charitable giving, making it easier and more flexible for senior donors to support the causes they care about.



Expand QCD Opportunities

Broadens Qualified Charitable Distribution eligibility, allowing more retirees to give directly from retirement accounts to nonprofits — tax free.



Modernize Giving Rules

Updates charitable giving provisions to reflect how Americans actually save and give today — not the rules of decades past.



Greater Flexibility for Donors

Creates more pathways for donors to structure charitable gifts in tax-efficient ways, reducing barriers that limit generosity.



More Dollars to Nonprofits

When giving is easier and more rewarding, more charitable dollars flow to the organizations serving communities across America.

The Evolution of Retirement -Based Charitable Giving

20 Years of Growth in Qualified Charitable Distributions (QCDs)

2006 — Pension Protection Act

Creates the IRA Charitable Rollover (QCD). Allows individuals age 70½+ to make tax-free charitable gifts directly from an IRA. Annual limit: \$100,000.



2019 — SECURE Act

Raises Required Minimum Distribution (RMD) age. Preserves QCD eligibility beginning at age 70½. Maintains charitable giving opportunity despite retirement changes.



2026 — QCD Limit = \$111,000

Inflation-adjusted growth from original \$100,000 cap.



2015 — PATH Act

Makes QCDs permanent after years of temporary extensions. Gives nonprofits confidence to invest in planned giving outreach.



2022 — SECURE 2.0

Indexes QCD limit for inflation. Creates new one-time option to fund charitable gift annuities and certain charitable remainder trusts. Further modernizes charitable giving rules.



□ Congress has expanded—not restricted—retirement-based charitable giving for two decades. The Charity Parity Act represents the next step in that bipartisan progression.

The Next Step — The Charity Parity Act (H.R. 8783/S. 4511)

AFP'S PRIMARY LEGISLATIVE PRIORITY

Expanding Charitable Giving Beyond IRAs

Today — Current Law

- ✓ Traditional IRAs eligible for QCDs
- ✗ 401(k)s
- ✗ 403(b)s
- ✗ Other employer-sponsored retirement plans

Proposed — Charity Parity Act

- Allows tax-free charitable rollovers from employer-sponsored retirement plans
- Creates parity between IRAs and workplace retirement accounts
- Helps donors give from the retirement assets where many Americans now hold the majority of their savings

Why It Matters

Expands the universe of potential retirement-giving donors

Creates new planned giving conversations with loyal patrons

Reaches donors who may not maintain a traditional IRA

Builds on a charitable giving tool with a long bipartisan track record

 **The Charity Parity Act is not a new concept — it extends a proven charitable giving policy to additional retirement accounts.**

Supported by a broad coalition including AFP, American Heart Association, Independent Sector, United Philanthropy Forum, The Nonprofit Alliance, and many other charitable organizations.

Why Congress Should Care

Lawmakers on both sides of the aisle care about the communities their constituents live in. Charitable organizations are essential to the fabric of those communities — and they need Congress to act.



Rising Demand on Nonprofits

Charitable organizations continue facing increased demand for services — food banks, shelters, health clinics, and more — even as funding remains uncertain.



Individual Giving is Critical

Individual donors remain the backbone of charitable support in America. Policy that encourages giving strengthens every community in every district.



Bipartisan Momentum

OBBBA made meaningful progress, but additional improvements remain available. Charity Parity builds on that momentum with broad bipartisan support.

Our Ask: Charity Parity Act

Be direct, confident, and specific when you make the ask. Members of Congress and their staff respect advocates who know what they want and ask clearly.

Ask 1: Cosponsor the Charity Parity Act

"Would the Senator / Congresswoman consider cosponsoring the bipartisan Charity Parity Act? It would modernize charitable giving rules and help more dollars reach nonprofits in our community."

Soft Ask: Continue Supporting Charitable Giving Policy

"We appreciate the passage of the non-itemizer deduction in OBBBA last year and ask support for policies that make it easier for Americans to give generously — and we're happy to be a resource for your office on these issues. Note: FEP's Q1 2026 release will be July 29th"

Congressional Philanthropy Caucus



Rep. Blake Moore (R -UT)



Rep. Danny Davis (D -IL)



A Bipartisan Forum for Philanthropy

The **Congressional Philanthropy Caucus** is co-chaired by **Rep. Blake Moore (R -UT)** and **Rep. Danny Davis (D -IL)** — a true bipartisan effort to elevate the role of charitable giving in Congress.

The Caucus provides a forum to discuss charitable giving, volunteerism, community partnerships, disaster response, and the future of nonprofit policy.

Why It Matters

Highlights philanthropy's essential role in American life; Promotes policies that encourage charitable giving; Educates Members on the issues facing nonprofits; Encourages bipartisan solutions for the sector; Gives your Representative a platform to champion local impact

Your Ask

"Would the Congressman/Congresswoman consider joining the bipartisan Congressional Philanthropy Caucus?"

Optional Discussion: OMB Grant Regulations

RAISE IF TIME ALLOWS

The Administration has proposed significant changes to federal grant regulations through the Office of Management and Budget. AFP is closely monitoring these developments because of their potential impact on the nonprofit sector.

Agency Discretion & Political Review

Proposed rules would expand agency flexibility in awarding and overseeing grants, raising concerns about consistency and politicization of funding decisions.

Foreign Relationship Scrutiny

Heightened requirements around international partnerships and affiliations could affect grantees engaged in global work.

DEI & Voter Engagement Provisions

Proposed restrictions on DEI activities and voter engagement work within federally funded programs are drawing broad sector pushback.

Cancellation Authority

Expanded executive authority to cancel grants raises operational and programmatic risk for nonprofit grantees.



Current Status: Comments due **July 13**.

ADVOCACY MESSAGE

Your Story Matters

Congress remembers stories — not statistics. Your personal experience as a fundraiser and philanthropy professional is your most powerful tool. Don't underestimate it.



Who You Serve

Describe the mission of your organization and the community it serves — in concrete, human terms your Member will recognize.



Why Philanthropy Matters Locally

Connect the national policy ask to local impact. How does charitable giving fund programs in this district?



How Giving Changes Lives

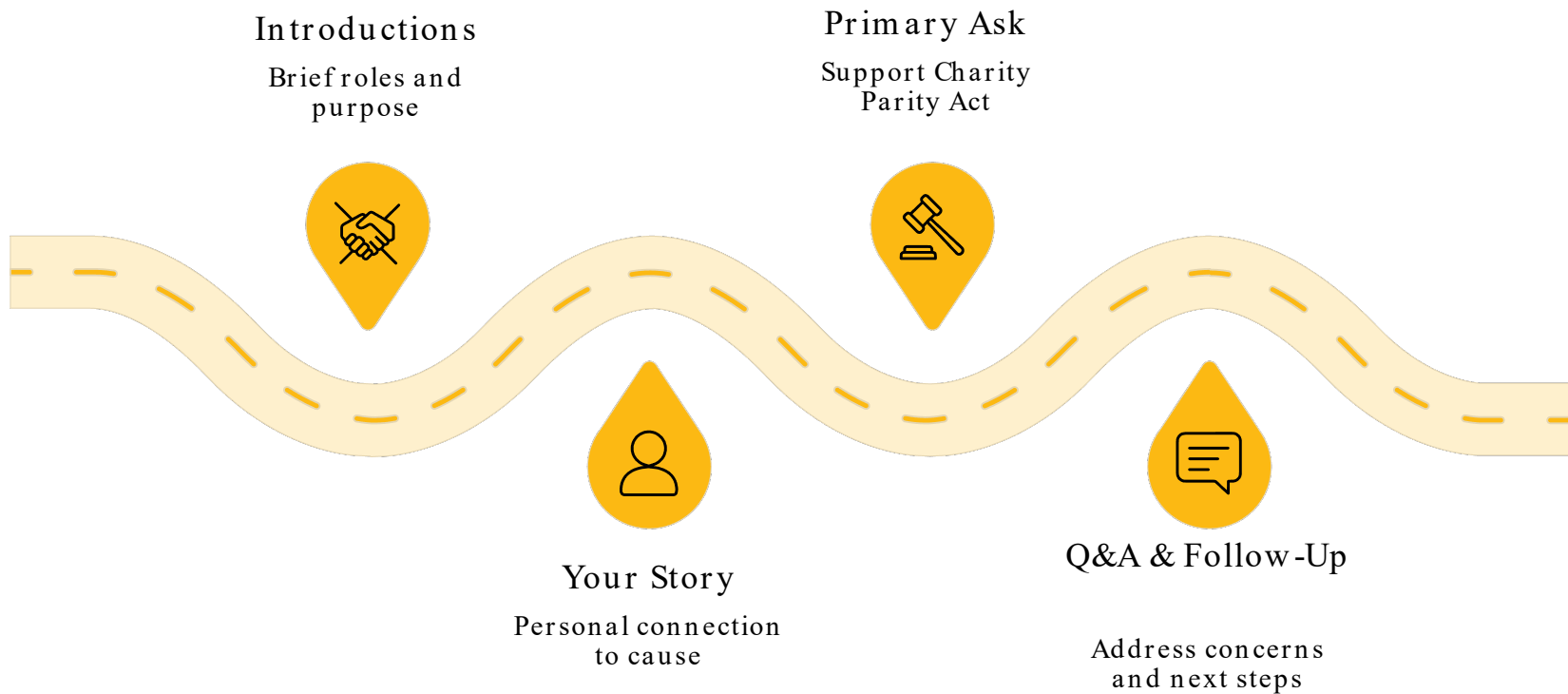
Share a brief, specific story about a real person whose life was touched by philanthropy. Make it vivid and memorable.



Keep your story to about **90 seconds**. Practice it aloud before your meeting so it feels natural and confident.

Meeting Flow

A well-structured meeting respects everyone's time and ensures you cover what matters most. Most congressional meetings run 15–30 minutes — plan accordingly.



Assign roles in advance — who opens, who tells the story, who makes the ask, who closes. A smooth, coordinated meeting leaves a professional impression that reinforces your credibility as advocates.

Tips for a Successful Meeting

✓ DO

- **Listen actively** — let the Member or staffer respond and engage
- **Be conversational** — this is a dialogue, not a presentation
- **Stay bipartisan** — philanthropy is nonpartisan; keep it that way
- **Ask questions** — "What issues are most important to the Congressman?" opens doors
- **Offer yourself as a resource** — invite them to visit your organization

✗ DON'T

- **Debate politics** — stay focused on shared values and community impact
- **Get lost in tax details** — keep the Charity Parity message simple and human
- **Overwhelm with too many issues** — stick to the priority asks
- **Assume a "no"** — even a skeptical Member may come around with time
- **Forget to leave materials** — AFP's leave-behind reinforces your message after you're gone

After the Meeting

The work doesn't end when you walk out the door. Follow-up is what turns a single meeting into a lasting relationship — and relationships are what move policy.



Send a Thank-You Email

Within 24–48 hours, send a brief, personalized thank-you to the Member and to any staff who participated. Reference something specific from your conversation.



Share Requested Information

If the Member or staff asked follow-up questions or requested materials, deliver them promptly. Responsiveness builds credibility.



Submit AFP's Meeting Report

Complete AFP's meeting report form so the national office can track progress, identify patterns, and coordinate next steps across chapters.



Keep Building the Relationship

Invite staff to visit your organization. Share updates on local philanthropy. Stay engaged throughout the year — Advocacy Week is the beginning, not the end.

AFP Resources

You don't have to walk into these meetings empty-handed. AFP is developing a full suite of advocacy tools to support you — available online before, during, and after your meetings.

Advocacy Toolkit

Comprehensive guide covering all of AFP's 2026 priorities, with background, talking points, and Q&A.

Charity Parity Fact Sheet

A one-page summary of the bill, its impact, and the case for cosponsorship — ready to leave behind at every meeting.

Congressional Leave-Behind

Professional materials designed specifically for Hill meetings — clear, concise, and branded for AFP advocates.

Meeting Talking Points

Scripted language for each ask, tailored for both Senate and House meetings, including the Caucus invitation.

Social Media Graphics

Share your advocacy activity on social media with AFP-branded graphics to amplify the message beyond the meeting room.

Staff Support & FAQ

AFP's policy team is available to answer questions before and after your meetings. You are not alone in this effort.

Thank You — Now Go Make Your Voice Heard

Every conversation you have with a Member of Congress during Advocacy Week 2026 advances the cause of philanthropy in America. Your credibility as a local leader, your personal story, and your passion for the communities you serve are what make this work.

Primary Ask

Cosponsor the **Charity Parity Act**

Secondary Ask

Join the **Congressional Philanthropy Caucus** (House only)

If Time Allows

Share AFP's concerns about **OMB grant regulations**

Advocacy Week is the beginning — not the end — of the relationship. Thank you for representing AFP and the philanthropic sector with confidence and conviction.

Q&A

Thank you!



Sally Schaeffer

Principal Consultant, Uncorked Advocates

www.uncorkedadvocates.com

Free weekly newsletter sign-up

Additional Resources

Office hours scheduled for members to ask questions and seek additional guidance: [July 7th at 4pm Eastern](#) & [July 15th at 2pm Eastern](#)

[Chapter Advocacy Week Website](#)

[Social Media Toolkit](#)

[Charity Parity Act](#)

[Philanthropy Caucus](#)

[AFP Fact Sheet](#)

[Proposed OMB Grant Changes](#)

[Advocacy for Nonprofit Leaders](#) (Webinar Recording)

[Support the AFP Political Action Committee](#)



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