Association of Fundraising Professionals

CHAPTER ADVOCACY WEEK

August 3-7, 2026

CHAPTER TOOLKIT

INTRODUCTION

During the **week of August 3rd**, AFP Global will be holding its 6th annual Chapter Advocacy Week. Chapter leaders can take this opportunity to be empowered and engage with elected officials to support public policies that protect your community, your own

organization's mission, and the broader AFP mission of striving to stimulate a world of generosity and positive social good through fundraising best practice.

During advocacy week, we will be asking every U.S. chapter to meet with at least one Member of Congress and/or their staff (either a U.S. Representative or either of your two U.S. Senators) about public policy issues addressing fundraising, philanthropy, and the nonprofit sector.

While AFP has a registered lobbyist working on Capitol Hill and collaborates with a number of charities and associations advancing important legislation, our chapters and members are our greatest advocacy strengths. Your local connections, and the expertise and experience you can bring about the impact of legislation on fundraising and philanthropy in your local area, can be incredibly influential with your Members of Congress. Members of Congress listen to their constituents and want to hear from you and understand how they can help.

This is a particularly important time for AFP members to participate in Advocacy Week. We saw the biggest changes in charitable tax policy in decades signed into law last summer as part of H.R. 1, One Big Beautiful Bill (OBBBA), including AFP's top priority of permanently restoring the charitable deduction for non-itemizers at $1,000 for individuals and $2,000 for joint filers. This was a once in a generation opportunity to restore the charitable deduction for non-itemizers, and AFP Global is grateful for everyone's support over the past few years.

As AFP tracks the impact of these charitable giving changes, we are already looking ahead on how to further expand giving. AFP Global has endorsed a bipartisan bill to incentivize more giving from seniors called the Charity Parity Act **(H.R. 8783/S. 4511).** This bill would allow rollovers not just from IRA accounts but expand to other employer-sponsored plans such as 401(k)s and 403(b)s.

Have questions about
Lobby Week?

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

This advocacy week also presents an opportunity for AFP members to highlight the current proposal by the Office of Management and Budget (OMB). On May 29, 2026, the OMB proposed sweeping changes to the Uniform Guidance, the set of rules that govern how federal grants, cooperative agreements, and other monetary awards are made to nonprofits, state and local governments, and other grantees. AFP joined the National Council of Nonprofits and over a thousand other organizations in expressing significant concerns about the proposal and urging OMB to withdraw or substantially revise it.

At a time of significant federal policy change, what is clear is that nonprofits need to localize these conversations. Provide facts on the importance of charitable giving and philanthropy to your community. Find common allies to coordinate messaging. Know the rules and use them: lobbying by nonprofits is not illegal; it is only limited. Talk to your legal counsel for guidance if you have concerns.

We are holding Chapter Advocacy Week so together, we can:

- Advance key legislation, such as the bipartisan Charity Parity Act (H.R. 8783/S. 4511), that will reduce the administrative barriers for seniors to give to charities from their retirement assets;
- Build our bipartisan champions in the House of Representatives by asking House Members to join the newly relaunched, bipartisan Congressional Philanthropy Caucus;
- Position AFP as a resource for Members of Congress and their staff, particularly on the
- OMB proposal but also on the implementation of the giving policy changes in OBBBA;
- Develop relationships between AFP chapters and Members of Congress;
- Engage members in the chapter and the public policy process; and
  Demonstrate the value of AFP membership in a unique way.

Issues

Our top legislative priority this year is the bipartisan Charity Parity Act (H.R. 8783/S. 4511), which would expand the Qualified Charitable Distribution (QCD) to allow donors to make tax-free charitable gifts directly from 401(k) and 403(b) retirement plans. This common-sense change would help unlock new charitable giving from retirement savings, provide donors with greater flexibility in how they support the causes they care about, and strengthen the long-term financial sustainability of nonprofits serving communities nationwide.

With the enactment of permanent charitable giving incentives for non-itemizers in 2025, Congress has an opportunity to build on that bipartisan success. The Charity Parity Act represents the next logical step by expanding charitable giving opportunities for retirees with employer-sponsored retirement plans.

We encourage chapters to discuss this bipartisan legislation during their meetings and ask their Members of Congress to support and cosponsor the bill. If they are already a cosponsor, thank them for their leadership and ask them to encourage their colleagues to join in supporting this important expansion of charitable giving.

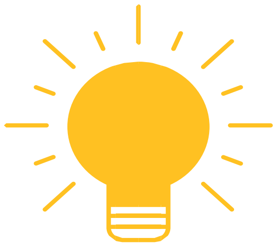
AFP Global has developed a Charity Parity Act fact sheet that you can share during your meetings.

➔ Consider putting together a personal letter of support with other AFP state chapters or your members. AFP Global has template examples.

PROCESS OVERVIEW

- Receive the toolkit (this very document!) and review it.
- Designate a chapter government relations chair or other position to head up Advocacy Week.
- Identify which Members of Congress you are going to meet.
- Begin to identify chapter members interested in participating.
- Make contact with the Congressional offices and schedule meetings (let AFP Global know through our online form).
- Plan for each meeting and share in advance the AFP Fact Sheet on the Charity Parity Act and AFP Global fact sheet.
- Attend scheduled meetings.

- Follow up after the meetings with the Congressional offices to thank them for the meeting and answer any questions raised by the Congressional office; do not forget to fill out AFP's feedback form after the meeting.



Key Point: *While AFP Global encourages meetings with Congressional offices to be held during the week of August 3rd, sometimes schedules and other issues may prevent that timing. Meetings held at other times are perfectly fine, the important goal is to get the meeting scheduled!*

You can meet with more than one Member of Congress if you have the time and resources. Or feel free to work with other chapters from your state to schedule a meeting with one of your two U.S. Senators with representatives from each AFP chapter.

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;
- 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 are 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.

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

However, just in case, there is 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 is not 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 social media messages, phone calls, emails, meetings and other lobby days and events. We need to get out there and have our voices heard—and that is what AFP Advocacy Week is all about!

Organizations should continue to follow their own internal policies regarding advocacy and consult counsel if they have organization-specific questions.

PREPARING FOR AN ADVOCACY 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 do not need a lot of people at 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.

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 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 will not be interested, and it will be a waste of your time.*

SCHEDULING THE MEETING

When you are ready to start scheduling meetings, identify your Members of Congress.

Before scheduling meetings, determine which Members of Congress represent your chapter members. The easiest way is to enter your home or organization's street address into the official congressional lookup tool on Congress.gov. The site will identify your U.S. Representative and both U.S. Senators and provide links to their official websites and contact information.

Congress.gov – Find Your Member: https://www.congress.gov/.

Then, visit the Member's official website and look for "Request a Meeting," "Scheduling," or "Contact." Many congressional offices now process meeting requests through an online form. If no scheduling form is available, call the Washington, DC office and request the scheduler's email address or the staff member responsible for tax or nonprofit issues.

State who you are and whom you are representing (the Association of Fundraising Professionals). Be sure to emphasize that you are a constituent. If multiple chapter members are attending the meeting, mention that several constituents from the district or state will participate.

Request a meeting with the Representative or Senator to discuss legislative issues around charitable giving—be specific if asked. Always request a meeting with the Member of Congress first. If the Member is unavailable, the office will typically assign the request to the appropriate staff member. If you need help finding the right contact, please email paffairs@afpglobal.org.

Then, send a formal email requesting a meeting with the Member of Congress and/or their staff. You can use the sample email below, and what specific issues you would like to discuss.

Key Point: *If you do not hear back in a few days, follow up with an email or phone call. If the Member of Congress is unavailable, they always request a virtual meeting with the staff member who works on the charitable giving/tax issue; they are typically based in DC. You can also request an in-person meeting with the District/State Director if the Member of Congress is not available.*

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 meeting with the [Senator / Representative] on [date and time] to talk about charitable giving and fundraising issues, especially the bipartisan Charity Parity Act (H.R. 8783/S. 4511). 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 over 25,000 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 meet in person or provide [a Zoom link/whatever technology the chapter can provide] if that is easier to schedule.

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 are not holding the same meetings repeatedly. 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 is best not to have more than six people in one meeting).*

PREPARATION AND PLANNING

Once you have your meetings scheduled, it is 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 day/time of the meeting. 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 are talking about and to prep the Member of Congress if they are attending. These documents should include:*

- *Fact sheet about AFP*
- *Fact sheet about the Charity Parity Act*
- *Local chapter fact sheet and/or news stories or examples of charitable giving.*

AFP will provide the above fact sheets (and 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 is 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. The Member's official website also includes committee assignments, legislative priorities, district offices, and recent news releases that can help you tailor your meeting and identify areas of common interest. You can research the staffer on LinkedIn or other social platforms.*

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, the bill (Charity Parity Act), or anything else that seems relevant. If a bio for the Congressperson 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 and share information about your local chapter;
- Talk about AFP Global, ethical fundraising and the work of a charitable fundraiser;
- Talk about the Charity Parity Act
- Make the Ask! Ask for co-sponsorship of the Charity Parity Act (H.R. 8783/S. 4511)

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 she spent two years studying at the college for which Betty works, and in the past, has served on the board of several arts organizations.

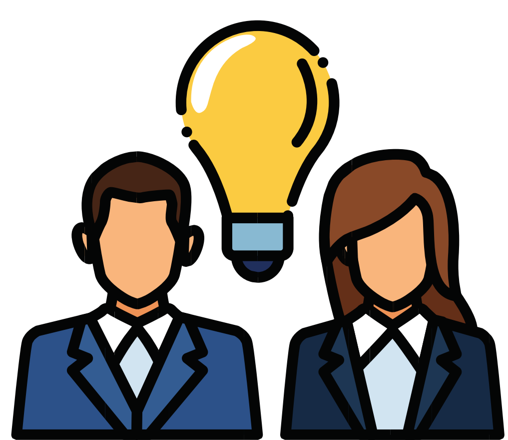
Elizabeth is taking notes. Since Aaron set up the meeting, he will start the discussion and get everyone introduced.

Because the Member of Congress attended Betty's college, she will 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. David would lead the part of the meeting on the value of incentivizing more giving from seniors and value of legacy/planned gifts for his 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 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 are waiting for it to begin. Here are a few tips to think about when you are in the meeting.

- **Be on point.** In the end, as with a donor meeting, it is 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 do not waste a lot of time. Thirty minutes is the most time you will have.
- **Be mindful of with whom you are 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 position, find out why. Try to produce a counterargument, but do not 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 Congressional 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.
- **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 in DC or other constituent meetings in the district. Maintain a professional and informative demeanor and continue to articulate the message you have 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 are pushing for.

FOLLOWING UP AFTER MEETINGS

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

First, debrief immediately after the meeting, if possible, with whichever members can stick around). 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 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. 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 of 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 make 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.