



CHAPTER LOBBY WEEK

OCTOBER 2 - 6 , 2023

TOOLKIT



INTRODUCTION

During the week of **October 2-6**, AFP Global will be holding its third annual Chapter Lobby Week. During this week, we'll 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 in 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 you can be helpful.

We're holding Chapter Lobby Week so together, we can:

- Advance key legislation that will increase charitable giving and help fundraisers perform their job more effectively;
- Position AFP as a resource for members of Congress and their staff;
- 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.

Have questions about
Lobby Week?

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



UPDATES FOR 2023

In-Person Meetings

We are encouraging you to ask to meet with your Member of Congress or their staff for in-person meetings while they are in the state for this District work period.

Issues

Our main legislative priority is the restoration and expansion of the universal charitable deduction. We encourage chapters to discuss this issue during their meeting and ask their Members of Congress to support and cosponsor the corresponding legislation - the *Charitable Act (S. 566/H.R. 3435)*.

AFP Global will provide a fact sheet and talking points to support you in these meetings.

PROCESS OVERVIEW

- Receive the toolkit (this very document!) and review it.
- Designate a chapter government relations chair or other position to head up Lobby Week.
- Identify which Members of Congress you're going to meet.
- Begin to identify chapter members interested in participating.
- Join a training webinar or take advantage of virtual office hours with AFP's registered lobbyist to role play for the meeting or become more familiar with what to expect.
- Make contact with the Congressional offices.
- Schedule meetings (let AFP Global know through our online form)
- Plan for each meeting.

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- Receive fact sheets from AFP.
- Attend scheduled meetings.
- Follow up after the meetings.



Key Point: While AFP Global encourages meetings with Congressional offices to be held during the week of October 2-6, 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;
- 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 Ins 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 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 Lobby Week is all about!

PREPARING FOR A 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.



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, use this easy-to-use [online directory](https://www.congress.gov/members) (<https://www.congress.gov/members>) to check the Member's website to see if they have an online meeting request form. If you don't see an online form, **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). Be sure to emphasize that you are a constituent.

Request to be connected to the scheduler who handles meetings in the district. You are asking for a meeting with the Representative or Senator to discuss legislative issues around charitable giving—be specific if asked. 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 and what specific issues you'd like to discuss. If you have difficulty getting connected to the scheduler, email paffairs@afpglobal.org and we can look to provide a contact.



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 District Director or another appropriate 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 meeting with the [Senator / Representative] on [date and time] when they are in the [District/State] to talk about charitable giving and fundraising issues, including the bipartisan Charitable Act (S. 566/H.R. 3435) to restore and expand the universal charitable deduction. 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]. 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 location. 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 Charitable Act*
- *Information about your Chapter*

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

In addition to personalizing the meeting packet with a fact sheet about your chapter, feel free to highlight your organization and its impact in the community.

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. Here are two options:

- 1) You assign two speakers and a notetaker. One speaker provides an overview of AFP, ethical fundraising, and your chapter. The other speaker then brings up the Charitable Act and why it is needed/why you're asking them to support it. The notetaker is able to report the results of the meeting to Global AFP, follow up on any questions raised, send a thank you note/email, and make sure to ask the staff at the end of the meeting if the group can get a picture with the Member for social/newsletters, etc.
- 2) Assign each participant a speaking role—it could be general information about AFP, ethical fundraising, the 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;
- 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 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.



SAMPLE MEETING STRATEGY, CONT.

Cathy is taking notes and pictures. 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. Elizabeth's faith-based group relies on small, individual donations and would benefit greatly if more Americans could get a charitable deduction even if they don't itemize. Other members will also offer their testimonials about how such a bill would benefit their organizations and how the temporary universal charitable deduction in 2020 and 2021 worked well. Elizabeth then directly asks the Member to cosponsor the Charitable Act.

If they are already a cosponsor/support (check www.congress.gov before the meeting to see), then thank them for their support and ask them to be a more engaged champion to help get the Charitable Act included in any end-of-the-year tax package.

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, arrive a few minutes early.
- **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 - 20 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.

MEETING TIPS AND GUIDELINES CONT.

- **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. 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 soon after the meeting if possible. 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 submit Congressional statements for the record 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

July: Identify a chapter government relations chair or other position to head up Lobby Week activities. Early August: 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.

Early August: Begin to identify chapter members who are interested in participating in meeting with their members of Congress.

Late August/Early September: Contact Congressional offices and set up meetings with members of Congress.

September: Attend AFP Global webinar/Zoom discussions to prepare, note any last-minute

September 13-15: Finalize roster of chapter member for each meeting. Ensure all meeting participants have talked, and each has been assigned a task or issue for the meeting. Also, receive final fact sheets and other documents from AFP Global to use during Congressional meetings.

September 25-29: Send confirmation email to staffer, including one pagers and other documents.

October 2-6: Chapter Lobby Week! Inform AFP Global of how meeting(s) went).

October 9-13: Send thank you emails and letters. Post picture/link to social about the meeting. Begin any follow-up requests from meetings.

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