Everyday Advocacy for Nonprofits

A Guide to Policy Advocacy

CCVO | EVERYDAY ADVOCACY | 2020

Welcome

The *Everyday Advocacy Guide for Nonprofits* is a practical guide for nonprofits wishing to engage in advocacy. This Guide is intended to help inform a range of nonprofit stakeholders, including executive directors, staff, board members, and volunteers, about the context, rules, and strategies that can be used to support nonprofit contributions to public policy dialogue and development.

The Guide is organized into seven chapters . The chapters can be read sequentially for a complete picture, or individually based on the needs and interests of your organization. Many of the chapters also contain practical resources that are downloadable and printable. The entire Guide, or individual chapters, can be downloaded in PDF format.

Created in early 2019 and updated in 2020 by CCVO, this Guide is based on what we know today. It will be updated to best reflect any policy changes. Readers are encouraged to confirm that the information presented in the Guide is still accurate.

No matter how you use this Guide, our intent is that it contributes to a healthy and participatory democratic process through the invaluable contributions of nonprofits across Alberta.

Are there other topics or resources you'd like to see to support your advocacy efforts? Let us know at policy@calgarycvo.org.

Table of Contents

Click below to jump to chapter:

In the spirit of reconciliation, we acknowledge the traditional territories in Alberta of the many First Nations and Métis, whose footsteps have marked these lands for centuries.

Chapter 1:

ADVOCACY IS A JOURNEY NOT A DESTINATION

No matter where you are in your advocacy journey, it is important to remember that engaging in advocacy is a long-term commitment that requires persistence and dedication while working towards your desired outcome. This chapter contains valuable insight that will help put your advocacy efforts into context to keep you motivated throughout your advocacy journey.

Preparing for the Long Game

When nonprofit organizations set out advocating for policy change, they might believe it is possible to achieve change in a short period of time. Unfortunately, this is not usually the case, and it can take years for policy change to be realized. It is important to recognize that policy advocacy is an ongoing process, marked with both milestones and setbacks on the path to reaching your ultimate goal. However, each step taken, even one that may seem to counter your efforts, is a step towards your nonprofit's end goal. Given that the rewards of your work are not always immediately realized, it is important to be committed to your goal and ensure that everyone involved in your advocacy efforts has the same expectations from the outset. This will take planning, organizing, patience, and persistence. Remember, change does not happen overnight.

There is No One Way to Reach the Goal

Policy advocacy is a critical and important activity for all nonprofits seeking to achieve lasting and meaningful change. Nonprofits can bring about real change through policy advocacy and it is an opportunity to advance your nonprofit's policy agenda (see chapter 5) with a strategic engagement strategy (see chapter 6). Advocacy work, however, is a continuous effort that is not time-constrained. While it is strategic to capitalize on election periods, it is equally important to build relationships with key stakeholders and policymakers year-round.

Policies and regulations can be created and undone – they can be eliminated by a determined opposition party, refocused political attention, or a change of government. The attention of legislators and policymakers can be quite short, often spanning only the time between elections. A change of government may bring to power politicians who know little or nothing about your issue, or do not see its value. Public attention also ebbs and flows – your nonprofit's issue might be the focal point of public attention today, but tomorrow you may find the public has moved on to other issues, leading to a loss of public support and setbacks to your advocacy efforts. Do not let these realities discourage you. These ebbs and flows are a natural part of democracy and reinforce why nonprofits must continue policy advocacy beyond election periods.

To reach your nonprofit's advocacy goals, remain adaptive and open to trying different approaches. Consider what you are comfortable compromising, and which issues you will advocate for at all costs. Advocacy is often about dialogue and negotiation, and it can be helpful to identify a "fall back" position that will allow you to still achieve an acceptable outcome, even if it is not perfect.

Tracking Your Success

Monitoring and evaluating throughout your advocacy efforts is crucial to success. During the planning and execution of an advocacy strategy, be sure to track progress towards your desired objectives. By monitoring what is working well and what is not, you will be able to stay on track to achieving your end goal. Be prepared to change your advocacy strategy if your monitoring shows that you are off course.

Evaluation, the measurement of the impacts of an advocacy project, examines the entire advocacy cycle. An effective evaluation focuses on the overall achievements of the project, and also measures the intended or unintended outcomes. Evaluation is about proving and improving – proving the success of your advocacy efforts and improving in areas that did not yield your desired outcomes.

Successful advocacy often depends on the current political environment, and the strategy that you are using, neither of which are easily measured. It requires a redefinition of what it means to succeed, and what it means to fail. Advocacy success does not necessarily mean that your ultimate goal is realized — you can, and should, also celebrate the small wins on the journey. For example, meeting with a Cabinet Minister to discuss your issue is a measurable objective to be recognized along the journey towards a goal of changing a policy.

Policy advocacy should not be treated as an end destination. Your efforts should continue with a focus on achieving your goal. Do not feel the weight of your advocacy strategy is on your shoulders alone — your advocacy work will continue even beyond your own efforts, building on the collective success of other nonprofits and policymakers.

RETURN TO TABLE OF CONTENTS

What is Advocacy?

Advocacy is an activity performed by an individual or group that aims to influence decisions within political, economic, and social systems and institutions. Nonprofits often turn to advocacy work when seeking to achieve systems-level change that could not be accomplished through service delivery alone. Advocacy efforts by nonprofits can propel social change to better meet the needs of individuals and local communities.

Chapter 2:

WHY ADVOCACY MATTERS: THE CRUCIAL ROLE THAT NONPROFITS PLAY

We live in a world of budget and resource limitations, differing opinions, and conflicting priorities. Engaging in advocacy is an opportunity for nonprofits to share their priorities with the public, represent communities, advance policies, and promote funding of meaningful objectives.

Nonprofits engaging in advocacy work bring benefits to communities at large, and also bring benefits to the organization through opportunities of attracting greater attention and creating broader impact.

Preparing for the Long Game

Nonprofits that are connected to causes can provide a bridge between the abstractions of public policy and the lived experiences of those for whom policies are designed. Although governments may have tools to determine levels of client satisfaction, organizations that deliver programs can provide more thoughtful feedback on the way policies and programs are experienced on the ground.[1] For example, when John Stapleton, Innovation Fellow with the Metcalfe Foundation, was asked about the interaction between advocacy organizations and government, he stated that, contrary to popular belief, government tends to follow the lead of organizations that are rooted in community.[2] Since public consultations are a key feature to effective policy making, without the advocacy work and input of nonprofits, policymakers would miss out on the public input needed for evidenced-based decision making.

Providing a Different Lens

According to author and political scientist Roger Gibbins, policy advocacy on behalf of registered charities is a moral imperative that should be encouraged rather than constrained. In Gibbins' address at CCVO's 2018 Annual General Meeting, he reminded us that nonprofits "not only bring more voices to the policy table, but also different voices".[3] I3 Indeed, nonprofits provide a platform for those with diverse interests who might otherwise be silent, such as prisoners and parolees, or endangered species and animals suffering from inhumane treatment. Without the concerted effort of individuals and nonprofits dedicated to various causes, certain voices, especially the most vulnerable and underrepresented, may otherwise remain silent in the policy process. While recognizing the polarizing climate we live in, Gibbins emphasizes that there continues to be an increase in the "necessity for, and risks of, advocacy" work.[4]

Tracking Your Success

High-impact nonprofits may start out by providing important programs but may eventually realize that they cannot achieve large-scale social change through service delivery alone. Advocacy efforts have the potential to move the needle on longstanding challenges that have hindered a nonprofit's ability to move forward on its mission. Volunteers and donors may also be drawn to support a nonprofit working on systemic issues because of the possibility for broader impact and the potential to attract the attention of policymakers, community leaders, and influential figures. Advocacy work can strengthen the appeal of a nonprofit as it works towards a more diverse and effective approach to achieving societal impact.

Building Alliances

Real social change is seldom accomplished by organizations working alone. Advocacy work creates opportunities for organizations with similar objectives to come together and build alliances. Actively participating in formal and informal networks that advance an advocacy strategy is often the most effective way to reach a broader audience. When nonprofits come together to "think like a sector", they can avoid working in silos and capitalize on the benefits of a network approach to achieve greater impact.

CLICK TO DOWNLOAD CCVO'S PRESENTATION:
THE CASE FOR NONPROFIT ADVOCACY

CLICK TO DOWNLOAD ADAPTABLE PRESENTATION:
THE CASE FOR NONPROFIT ADVOCACY

RETURN TO TABLE OF CONTENTS

Get inspired with Bolder Advocacy's stories of nonprofit advocacy.[5]

Find out how nonprofits have used grassroots mobilization, public awareness campaigns, and meetings with elected officials to bring about change in areas like access to healthcare and education. **Let's learn and build on the success!**

Chapter 3:

WHY NONPROFITS MATTER: THREE MAJOR CONTRIBUTIONS OF THE NONPROFIT SECTOR

Nonprofits have a profound impact in Alberta and it is important that organizations talk about the value of the sector as a whole — but it can be challenging to communicate the greater value of the sector to government. To help articulate this, we've highlighted three major contributions of the nonprofit sector that demonstrate its collective impact on society and the economy.

1. Nonprofits Contribute to Our Social and Cultural Fabric

Nonprofits play a vital role in society, providing key services for Albertans. Their work touches on social and cultural issues and values that are otherwise underserved. Nonprofits have been historically formed to fill a gap in services not provided by government or private businesses. For example, in the 1990s, the Government of Alberta outsourced the delivery of essential services to nonprofits to reduce the cost of government services. This government outsourcing led to the formation of many nonprofits within Alberta to provide essential services and support for citizens.

Nonprofits are incredibly diverse and enrich Alberta's social and cultural experience through a variety of subsectors, including: arts and culture, sports and recreation, religion, social services, development and housing, environment, education and research, health, and advocacy among others. Unique in their direct work with community groups, nonprofits serve diverse populations, geographical locations, harness insights, and deliver solutions to complex societal challenges. With thousands of organizations providing much-needed services, nonprofits are significant contributors to the communities they serve, and the social and cultural makeup of our province.

2. Nonprofits are Cornerstones of a Thriving Economy

Nonprofits play a critical role within our economy. Canada's nonprofit and charitable sector is the second largest in the world, employing over two million people. There are more than 170,000 nonprofit organizations in Canada that represent 10.5% of the labour force and contribute to 8.5% of Canada's GDP.[6]

In Alberta, the nonprofit sector is equally important to the economy and creation of jobs. Its impact has grown substantially in the last decade and will continue to contribute to the economic wellbeing of the province.

In Alberta, the sector is comprised of:

- More than 26,000 nonprofits in Alberta[7]
- Nearly $10 billion of the province's GDP[8]
- 450,000 nonprofit employees[9]
- 262 million annual volunteer hours[10]

3. Nonprofits are Crucial to Democratic Participation

Nonprofits play a vital role in democratic participation by bringing the voice of the communities they represent to public discourse. They work to increase awareness and understanding of issues by addressing policies, laws, and regulations relevant to their cause or the communities they serve and are well positioned to hold governments and decision-makers accountable. Political candidates and parties seek out open dialogue with nonprofits in efforts to better understand and respond to their constituents' needs. This provides a platform for nonprofits to engage in advocacy relevant to their cause.

Despite the importance of democratic participation, nonprofits and charities have a longstanding hesitation towards policy advocacy, with some organizations even distancing themselves entirely to avoid risking their charitable status. Recent changes (see chapter 4) have been made in legislation to address these concerns and encourage nonprofit participation in public policy advocacy.

All nonprofits — including charities — have an important role in advocating for good public policy. This participation becomes even more important in advance of an election and in times of crisis.

Alberta's Nonprofit Sector

≈ $5.5 Billion
in GDP contributions to Alberta's economy [i]

262 Million
annual volunteer hours [ii]

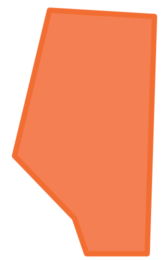
46% of nonprofit revenue is earned income [iii]
(national figure)

450,000
nonprofit employees [iii]
(211,500 full-time and 238,500 part-time)

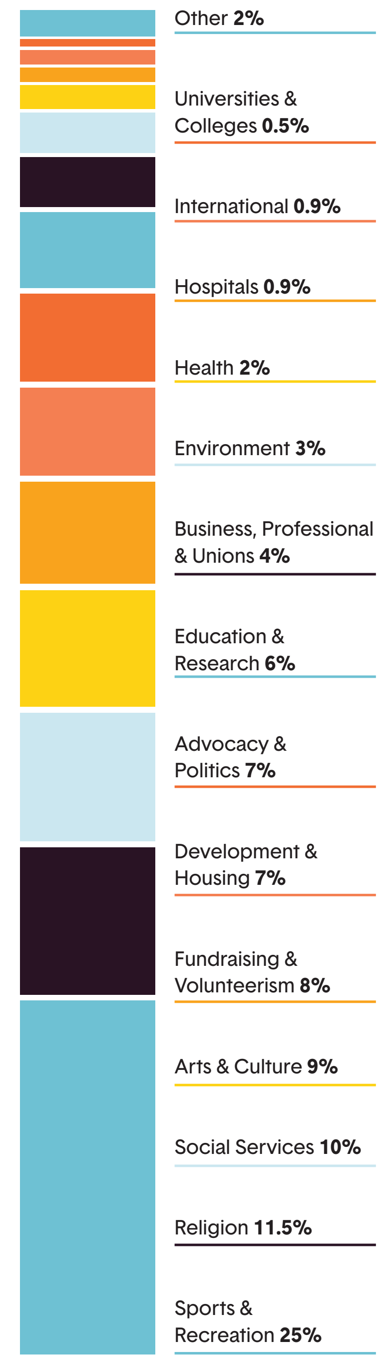
Sources
[i] Profiling Volunteerism: An Alberta Nonprofit/Voluntary Sector Initiative Discussion Paper of the Value and Contribution of Alberta Volunteers (2020)
[ii] Statistics Canada General Social Survey on Giving, Volunteering and Participating (2013)
[iii] ANVSI: Profiling the Nonprofit and Voluntary Sector in Alberta (2018)

CLICK TO DOWNLOAD THE ALBERTA NONPROFIT SECTOR INFOGRAPHIC

RETURN TO TABLE OF CONTENTS



26,000+
nonprofits across Alberta represent several subsectors, including:



Government of Alberta Nonprofit Listings (2018)

Chapter 4:

RULES OF ENGAGEMENT FOR NONPROFIT ADVOCACY

Before engaging in public policy advocacy, nonprofits should make sure they understand the rules and regulations around what they can and cannot do, so that they can engage with clarity and confidence. Knowing the rules can empower your organization to lead and encourage important discussions.

Get informed! The first steps to becoming informed involve the understanding of three relevant regulatory areas:

1. Canada Revenue Agency's Regulations
2. Lobbying in Alberta
3. Third-Party Advertising in Alberta
4. Lobbying in Canada
5. Third-Party Advertising in Canada

These areas may or may not apply to your nonprofit, depending on whether you are a registered charity, you have paid staff, and how much you spend on election-related activities.

Canada Revenue Agency's Regulations

Nonprofit organizations that are federally registered as charities must adhere to the Income Tax Act (ITA) regulations, as interpreted and applied by the Canada Revenue Agency (CRA). Recent Amendments to the ITA allow registered charities to engage in unlimited public policy dialogue and development activities (PPDDAs), so long as these activities are:

- related to and support the organization's stated charitable purpose(s), and
- nonpartisan (this includes a ban on both direct and indirect partisanship).

PPDDAs generally involve seeking to influence the laws, policies, or decisions of a government, whether in Canada or a foreign country. In light of the new changes, charities must still be created and operated exclusively for charitable purposes. Only nonprofit organizations that are registered charities need to adhere to these regulations.

Direct and Indirect Partisanship

A registered charity can publicly support or oppose a law, policy, or decision of government that a political party or candidate also supports or opposes. A charity can do this at any time, inside or outside of an election period, so long as the charity does not refer to the political party or candidate. Thus, a charity's communications should focus on policy issues and should not refer to any candidate or political party.[11]

Nonpartisanship does not mean non-participation. There are many ways that registered charities can engage in nonpartisan-related activities. Furthermore, the ability to engage in nonpartisan advocacy can be viewed as a strength for organizations, as it can work to:

- Create an environment of respect for the diversity of political opinions among staff, volunteers and people who your charity serves.
- Give you access to diverse community leaders and funding sources.
- Reaffirm charities' position as trusted sources that can engage with and give voice to underserved populations and topics, beyond party lines.[12]

As Canadian citizens, staff and volunteers have a right to participate in the democratic process.[13] This means, as individuals, they are not bound to nonpartisan dialogue – as long as they are not acting in their official capacities as representatives of a registered charity. Check with your organization regarding any conflict of interest policies that may exist.

To avoid partisan engagement during your advocacy efforts, consider the following dos and don'ts.

Do:

- ✓ focus on the charitable purposes that your PPDDAs are meant to achieve.
- ✓ keep records that demonstrate your primary consideration in carrying on PPDDAs is to further your charitable purpose and provide a public benefit.[14]
- ✓ review legal requirements of other legislation such as Alberta Elections Act and Lobbying Act.
- ✓ give all political candidates and parties an equal opportunity to present their views and answer questions.

Don't:

- ✗ focus on, promote or oppose a political candidate or party publicly or internally.
- ✗ instruct or influence constituents to vote for a specific candidate or party.
- ✗ work with or coordinate with campaigns, political candidates or parties.
- ✗ transfer resources (ex. financial, human, or physical resources) to support or oppose a political party or candidate directly or through a third party, or allow a political party or candidate to use your charity's resources without compensation.
- ✗ refer to or identify a political party or candidate when supporting or opposing a law, policy, or decision of government.

For more information on CRA's draft guidance documents and examples of direct and indirect partisanship visit here.[15] Please click here for Explanatory Notes Relating to the Income Tax Act Legislation.[16]

Lobbying in Alberta

Lobbying is a legitimate activity in a free and democratic society. Lobbyist regulations across different levels of government are meant to balance free and open access to government with public transparency as to who is accessing and seeking to influence government.

The Alberta Government defines lobbying as communication with a public office holder in an attempt to influence matters relating to:

- Legislation (including legislative proposals, bills, resolutions, regulations and orders in council).
- Programs, policies, directives, or guidelines.
- The awarding of any grant or financial benefit.
- Decisions by the Executive Council to transfer assets from the Crown or to privatize goods and services.
- In the case of consultant lobbyists, arranging a meeting between a public office holder and any other individual; or communicating with a public office holder in an attempt to influence the awarding of a contract.[17]

Nonprofits are exempt from the Alberta Lobbyists Act and therefore are not required to register as lobbyists, except for:

- Nonprofits that are constituted to serve management, union or professional interests.
- Nonprofits that have a majority of members that are profit-seeking enterprises or representatives of profit-seeking enterprises.

By definition, lobbyists are **paid staff**. Nonprofits that fall under the exceptions above must only register if they have reached the 50-hour **annual lobbyist threshold**, whi ch includes both time spent lobbying and time spent preparing for lobbying.

Click here for more information on the different types of lobbyists and exemptions.[18] Click here for a lobbying toolkit for nonprofits developed by IntegralOrg which includes a summary of some of the relevant legislation in Alberta.[19]

Third-Party Advertising in Alberta

Third-party advertising rules are meant to ensure that the public is aware of who is placing and paying for political and election advertising at the different levels of government.

In Alberta, “election advertising” refers to advertising that promotes or opposes a registered party or a registered candidate during an election advertising period (The election advertising period starts on December 1st, or from the issue of a writ for the election, until the end of polling day).

According to Elections Alberta, issue-based advertising that is not directly promoting or opposing a political candidate or party, can be included in third-party election advertising. This means if your nonprofit spends money on paid advertising that advocates for or against an issue that a registered party or candidate is merely associated with, you may need to register as a third-party advertiser.

A registered charity is not eligible to register as a third-party advertiser through Elections Alberta. However, nonprofits that are not registered charities are required to register as third-party advertisers if they have incurred or plan to incur expenses of at least $1,000 for election advertising, or they have accepted, or plan to accept, at least $1,000 in election advertising contributions. There are no advertising donation limits, but advertising expenses are limited to $150,000 during the election advertising period.[20]

Please click here to view the full Elections Alberta Third-Party Advertiser Guide.[21]

PROVINCIAL RULES OF ENGAGEMENT: POLICY ADVOCACY

REGULATORY AREA	REGULATION	APPLIES TO	DOES NOT APPLY TO
	Charities can engage in unlimited public policy dialogue and development activities, so long as these activities further their charitable purpose(s) and do not involve the direct or indirect support of, or opposition to, any political party or candidate for public office.	Registered charities.	All other nonprofits (not registered charities).
Alberta Lobbyist Act	Must register if 50 hours of lobbying has been reached.	Nonprofits that serve management, union or professional interests, or that have a majority of members or representatives that are profit-seeking enterprises.	All other nonprofits (not among the two listed exceptions).
Alberta Third-Party Act	Must register if have spent or plan to spend $1,000 or more on political advertising.	All other nonprofits (not registered charities).	Registered charities.

CLICK TO DOWNLOAD RULES OF ENGAGEMENT AT A GLANCE

RETURN TO TABLE OF CONTENTS

Lobbying in Canada

Lobbying is a legitimate activity in a free and democratic society. Lobbyist regulations are meant to balance free and open access to government with public transparency as to who is accessing and seeking to influence government.

The Federal government defines lobbying as communication with public office holders*, for payment, with regard to:

- The making, developing or amending of federal legislative proposals, bills or resolutions, regulations, policies or programs.
- The awarding of federal grants, contributions or other financial benefits.
- In the case of consultant lobbyists, the awarding of a federal government contract and arranging a meeting between their client and a public office holder.[22]

Consultant and In-House Lobbyists

A nonprofit can engage two types of lobbyists:

1. **Consultant lobbyist:** A person who is hired to communicate on behalf of a client. This individual may be a professional lobbyist but could also be any individual who, in the course of his or her work for a client, communicates with or arranges meetings with a public office holder. Consultant lobbyists are required to register with the Office of the Commissioner of Lobbying within 10 days of being retained as a lobbyist for a client.[23]

2. **In-house lobbyist:** A person who works for compensation in a nonprofit entity. Nonprofits must file a registration when lobbying activities constitutes a significant part of one or more of its employees' duties.[24] In-house nonprofit lobbyists must register within two months of the beginning of their lobbying activities.[25]

* Federal public office holders are virtually any employee of the federal government, whether elected or appointed. This broad category includes Members of Parliament, Senators, parliamentary staff, members of the Canadian Armed Forces and the Royal Canadian Mounted Police, and federal government employees.

Grass-Roots Communications

Grass-roots communication occurs when a person appeals to members of the public through the mass media, including social media, or by direct communication. The appeal is meant to persuade the public to communicate directly with a public office holder in an attempt to place pressure on the public office holder to endorse a particular opinion. Paid lobbying through grass-roots communication may require registration, even if there is no direct communication with public office holders. For example, if you invite the public to write to their Members of Parliament about an issue, you may be lobbying.[26]

You do not need to register as a lobbyist if you are:

- a volunteer, as they are not paid to communicate with public office holders.
- making a written submission to a parliamentary committee.
- making a request to public office holders for information or for the interpretation of a Canadian law.
- a citizen communicating with government officials on behalf of yourself.

Click here to see if you are required to register as a lobbyist.[27] Click here for a lobbying toolkit for nonprofits developed by IntegralOrg which includes a summary of some of the relevant legislation in Canada and a 15-minute video that demonstrates the basics of lobbying, lobbying legislation, public office holders, registering as a lobbyist, grassroots lobbying, and more.[28]

Third-Party Advertising in Canada

A third party is a person or group who wants to participate in or influence elections other than as a political party, electoral district association, nomination contestant or candidate. The Canada Elections Act regulates the registering and reporting requirements of third-party advertising at the time of an election.

Nonprofits must register with Elections Canada as a third-party immediately after spending $500 or more on ‘regulated activities’ that take place during the pre-election period or election period. Click here to view associated spending limits.[29]

Regulated Activities

‘Regulated activities’ is an umbrella term for partisan activities, election surveys, partisan advertising, and election advertising. The following is a more detailed description of each of the regulated activities:

1. **Partisan activities** are activities carried out by a third party that promote or oppose a political party, nomination contestant, potential candidate, candidate or party leader. This **does not include** taking a position on an issue with which the party or person is associated. Note: activities to fund raise for a third party are excluded from partisan activities.

2. **Election surveys** Election surveys are surveys designed and conducted (or caused to be conducted) during the pre-election or election periods by third parties to determine whether or not to organize and undertake other regulated activities. The survey could be about voting, or about an issue with which a registered party or candidate is associated. For example, an election survey **could include** conducting a telephone survey in a riding to collect information about voting intent and using the results for targeted door-to-door canvassing.

3. **Partisan advertising** is defined as the transmission to the public by any means during the pre-election period of an advertising message that promotes or opposes a political party, nomination contestant, candidate or party leader. This **does not include** taking a position on an issue with which the party or person is associated.

4. **Election advertising** is defined as the transmission to the public by any means during the election period of an advertising message that promotes or opposes a registered party or candidate, **including** by taking a position on an issue with which the party or person is associated. Therefore, you may be regarded as a third-party advertiser even if your communications are not explicitly linked to any party.

The Pre-Election Period and the Election Period

The pre-election period starts on June 30 in the year of a fixed-date general election and ends on the day before the general election is called. The election period starts on the day the election is called and ends on election day when the polls close. Nonprofits can undertake any of the pre-election or election regulated activities so long as there is appropriate registration and reporting.

Nonprofits that are registered charities should only consider undertaking election surveys and non-partisan election advertising as they are not permitted to engage in other registered activities because they are considered partisan political activities. It is important to note that once the election period begins, the categories of regulated activities and advertising broaden to catch non-partisan election advertising, including issue-based advertising. Registered charities that engage in issue-based advertising should be monitoring related expenses and reporting as needed.

Click here to view Elections Canada Third Party Roadmap resource.[30]
For more information about registering, click here.[31]

FEDERAL RULES OF ENGAGEMENT: POLICY ADVOCACY

REGULATORY AREA	REGULATION	APPLIES TO	DOES NOT APPLY TO
CRA Regulations	Charities can engage in unlimited public policy dialogue and development activities, so long as these activities further their charitable purpose(s) and do not involve the direct or indirect support of, or opposition to, any political party or candidate for public office.	Registered charities.	All other nonprofits (not registered charities).
The Lobbying Act	Must register if in-house cumulative lobbying activities constitutes a significant part of one or more of your employees' duties.	All nonprofits including registered charities.	N/A
Canada Third-Party Advertising	Must register immediately if $500 or more has been spent on: partisan activities, election surveys, partisan advertising, and election advertising in the pre-election or election period.	All nonprofits including registered charities as it relates to election surveys and issue-based election advertising.	Partisan activities and partisan advertising do not apply to registered charities.

CLICK TO DOWNLOAD 'FEDERAL RULES OF ENGAGEMENT'

RETURN TO TABLE OF CONTENTS

Chapter 5:

SETTING A POLICY AGENDA

There are no step-by-step rules or established set of parameters that nonprofits can follow to ensure success when seeking public policy change. What we can do, though, is develop a policy agenda — a set of issues or problems aimed at gaining the attention of policymakers and decision-makers — sometimes known as the "policy ask". Setting a policy agenda involves many components, including: identifying the issue, forming a clear goal or goals, framing the issue, and creating conditions for success.

It might seem like a daunting task to set a policy agenda, but it does not have to be an intimidating or complex process. Simply, setting a policy agenda is a way for your nonprofit to potentially increase its impact by focusing on a few key policy priorities. For example, you can clean waste out of a river, and also ask government to legislate that polluting rivers is illegal – both work to achieve the goal of a clean river. Policy advocacy work is best as an everyday focus, not just a one-off activity, which is critical in preparing for expected and unanticipated opportunities to bring your policy agenda forward.

Specific vs Broad Policy Agendas

It may be tempting to think of a policy agenda as a specific policy ask but this is not always the case. That might be true in some cases, where the policy agenda consists of a very technical or specific policy ask (e.g. requesting a cost of living increase for income supports). Specific asks can be helpful, as the issues your nonprofit is trying to address are likely complex, so your policy agenda might represent a stepping stone to the broader changes you wish to see. It may also be the case that a policy ask is more aspirational, idealistic, or inspirational (e.g., to reduce poverty by 50% in five years). Both of these approaches are valuable and serve different purposes – specific policy requests can make a big impact and broad policy requests can serve to prepare and motivate allies and supporters.

Creating a policy agenda is not likely to be a neat and tidy process. A good policy agenda is not created in a vacuum and is sure to be accomplished only after several revisions, lengthy discussions, and healthy debate. The more people you can talk to who have differing views and positions, the more robust and thoughtful your policy agenda will be.

To set the issue or issues on which you will focus your policy agenda, consider your strengths as a nonprofit by asking questions like:

- What issues have you already researched? What expertise do you possess?
- What policy issues have you been involved with in the past? Are there opportunities to build on previous momentum?
- If your nonprofit is a registered charity, does this issue fall within your charitable objects?
- What is the capacity of your nonprofit? Who can lead and who can support the work?
- What connections with the intended audience (e.g. government, community, industry) already exist?
- What are other nonprofits doing and can you leverage each other's work?
- What kind of policy shift would make a big impact on the people, community, or issue in your nonprofit's mandate?

Set Your Goal

Oftentimes, we consider policy change to be the end goal, but you may not want to start there. Ask yourself what it is you want to achieve with your policy agenda. The following are a few examples of some goals your nonprofit might be trying to reach through a policy agenda:

- Establishing credibility and/or expertise on a particular issue.
- Building relationships with bureaucrats, elected officials, and/or media.
- Maximizing impact by forging partnerships with other organizations.
- Creating engagement among stakeholder groups.
- Educating and/or informing decision-makers about issues.
- Seeking public commitment on a policy issue from parties (either through the party platform or other public declaration of support).

Framing Your Agenda

Framing refers to the lens that you will apply when communicating about the issue(s) on your policy agenda. There are multiple ways to look at every issue or problem, so it is important to frame your policy agenda with communications that are crisp, clear, and in a language that speaks to your audience.

Framing a policy agenda comes back to your nonprofit's ultimate goal — once you have become clear in what you hope to achieve, you can ask yourself some of the following questions to help you frame your policy agenda:

- What problem does this solve and how can that be communicated in a way that conveys the importance of your ask?
- Who is your audience? Be specific – who are you trying to reach with your message?
- What is most relevant or compelling about this issue to your audience?
- What does your audience already know about this issue?
- What is the language that will resonate with this audience?
- What evidence exists for your issue? How prominently does the evidence feature in your message? Evidence to support your policy agenda is important but it is rarely the central story, it is a supporting player.
- Who does your issue impact? What would be the effect if your policy agenda was implemented?
- Who are the critics and what are the risks?
- Who are the allies and how can you bring them along?
- Whose jurisdiction does the issue fall into?
- How critical is the issue? Is there a need for immediate action or can it be addressed over time?

Creating Conditions for Success

Although there is no magic formula for developing a policy agenda, there are ways to set conditions for success to strengthen and position your policy agenda:

1. **You know people.** And you know people who know people! Reach out to your networks, and the networks of your networks, to talk to a variety of people about your policy ideas. This may even lead to a collaborative approach and a stronger voice advocating for the same issue.

2. **Test out your ideas for unintended consequences.** Think through as many of the possible outcomes as you can by consulting with people who would be impacted by your policy agenda.

3. **Know the timing.** Find out when and how all political parties are developing their platforms.

4. **Stay up to date on current events.** You can sign up for newsletters from parties, pay attention to news of the day, and find e-news sources that are timely and informative.

5. **Stay focused.** Remain true to your policy agenda but be nimble on how to move it forward by monitoring, learning, and adjusting your plan as you go along.

CLICK TO DOWNLOAD A SAMPLE POLICY AGENDA

RETURN TO TABLE OF CONTENTS

Have fun with it!

Remember that setting a policy agenda does not have to be a daunting task, but instead a way to maximize the impact your nonprofit has on the communities you serve.

Chapter 6:

DEVELOPING AN ENGAGEMENT STRATEGY

If your nonprofit has spent time determining a policy agenda, it is time to develop an action plan for engagement. The development and implementation of an engagement strategy is often when the work becomes publicly visible. Choosing to make your policy priorities visible is a significant step for your nonprofit and should be approached in a coordinated and strategic manner. This chapter focuses on tackling the shorter-term objectives through various tactics, which all work towards achieving longer-term advocacy goals.

Focus on Your Goals and Choose Your Tactics

The more time you spend setting your policy agenda (see chapter 5) and goals, the easier it will be to determine which tactics to pursue as you develop your engagement strategy. Figuring out this strategy will require you to review and assess which tactics are available to you and would be most useful in moving your policy agenda forward. These might include face-to-face meetings with Cabinet Ministers, City Council Members, or organized campaigns around an issue — each has its benefits and considerations. See the table at the end of this chapter for a snapshot of tactics you may consider using as part of your engagement strategy.

Bring People Along With You

As part of your strategy development, be sure to investigate what other advocacy efforts are happening in the community. Consider how other efforts might support, hinder, or cause you to adopt a more collaborative approach to your strategy. You might find that your policy agenda intersects with the work of other groups, or that it could be strengthened through a network approach. For instance, if a nonprofit immigrant serving agency was interested in fighting against discriminatory policies or practices in the workplace, they might choose to connect and share resources with an organization that recently published a report on strategies to address discrimination.

You might also consider that another group has the ability to speak better to certain issues and you could benefit from drawing on their strengths. Formal and informal networks can play out in different ways, from organizing a policy development working group, to carrying out joint projects, such as events or submissions to government. Keep in mind that networks tend to be held together by transparency and commitment to common values, as opposed to rigid adherence to specific group interests and objectives.

Know the Landscape

It will be important to stay connected to news outlets, and community interests to keep tabs on when important information becomes available, as well as regularly checking government websites and when government officials plan to engage with the public. Create a timeline and plot out the initiatives that you would like to undertake and the important community discussions you will plug into. While it is important to be organized and have a solid engagement strategy, it is even more important to spend effort monitoring, learning, and adjusting your plan as you go. In the context of an uncertain political environment, policy advocacy planning should be flexible and responsive.

Craft Your Communications

Whatever tactic or combination of tactics you decide to pursue, it will always be important to focus on the content. Is the message you are sharing in your communications inspiring and effective? Here are a few questions to ask and tips to help guide the way as you engage with political candidates and your intended audience:

Is your content objective, fact-based, well-reasoned, and non-partisan?

TIP: Share local data and statistics about your nonprofit, or the broad nonprofit sector – you may surprise people with your findings.[32]

Have you engaged your audience (communities, candidates, decision-makers, etc.) in different ways?

TIP: Your message often needs to be heard multiple times through different avenues before it is remembered.

Have you used storytelling in your communications?

TIP: People are more likely to remember information told as a story, with characters, a beginning, middle, and end, a plot, conflict, and resolution.

Have you used visuals and descriptive language in your communications to help create a picture of the solution you're proposing?

TIP: Research shows that readers understand and are more likely to remember material when it is expressed in language that allows them to form visual images or that connects to the senses.[33] For example, the simple use of the word "sweet" draws a stronger response than "kind" and the same for "bitter" compared to "mean."[34]

Are your calls to action clear and specific?

TIP: Be clear on how the proposed solution will help your target audience solve the problem, and how they can play a role in the solution, to make the call to action more effective. For example, instead of asking people to end climate change, encourage people to reduce gas emissions by carpooling, riding a bike or walking.

Are your recommendations to government or political candidates/parties clear and specific?

TIP: The more specifics you provide, the closer you will bring the decision-maker to deciding. For example, instead of asking for a nonprofit strategy, CCVO has specifically suggested the creation of a Premier's Advisory Council[35] on the Nonprofit Sector that reports directly to the Premier and Executive Council, an approach that will ensure clear lines of accountability.

CLICK TO DOWNLOAD A SAMPLE ENGAGEMENT STRATEGY

CLICK TO DOWNLOAD THE ENGAGEMENT STRATEGY TOOLBOX

RETURN TO TABLE OF CONTENTS

ENGAGEMENT STRATEGY TOOLBOX

TACTIC	OPPORTUNITY	CONSIDERATIONS
Convening conversations	Nonprofits are well-positioned to convene conversations and increase public understanding of issues.	It can be challenging to stay focused when there are multiple stakeholders with different interests involved in discussions. Inclusion is important and so is staying true to your goals.
Participate in local events and encourage discussion on your issue	Many of community events provide opportunities for questions from those in attendance - have your question prepared in case you have a chance to ask about your issue.	Be respectful of the organizer and make sure your issue is related to the topics at hand.
Collaborate when necessary	Working with other nonprofits or with the for-profit sector can be helpful in gaging support from the government. Assessing what other organizations have to say about issues of importance to your nonprofit, and sharing that information can be very valuable to people who care about the issues that your nonprofit works on.	Reach out to partner organizations for a strategy session on your policy ask.
Sharing resources and background materials with governing party and official opposition	This is a great way to educate your MLA or the opposition party about your issues, your constituency, or your community. Government's rely on you to educate them about your issues.	You may share research and your policy priorities with your MLA, cabinet ministers, deputy minsters, or public servants, and ensure that the same information is available to all individuals that need to be informed.
Attending face-to-face meetings with your MLA, cabinet ministers, deputy ministers, or public servants	These meetings can be helpful and can bring attention to your issue. It will also help with getting answers to questions and further advise, and evaluate your policy asks.	Make sure to: • Prepare talking points, issue, briefs, fact sheets, etc. • Keep it brief and use plain language • Anticipate their questions • Send thank you letters, including contact information for further questions, and follow-up with summary notes, actions items, etc.
Public awareness campaigns	Sharing stories and background materials through traditional and social media is a great way to increase understanding and awareness with public stakeholder groups and the community.	You may oppose or support a policy, but keep your communication nonpartisan by making sure it is not connected to a single candidate or political party.

Chapter 7:

TIPS FOR ENGAGING WITH THE MEDIA

Engaging with media outlets is one tactic to consider in your engagement strategy. Media exposure can help bring awareness to your causes and start public dialogue and collaboration among community members. This chapter highlights tips provided by CCVO's trusted contacts in media, that can help make your outreach to media more effective.

Understand the news cycle and newsrooms.

Mainstream media – major television networks and newspapers – have been significantly impacted by the advent of social media channels and continue to lay off staff as their revenues plummet. Because of this, most newsrooms have limited staff on the weekends. If you want to hold a press conference on a Saturday or Sunday, make sure to give the newsrooms several days' notice so they can plan accordingly. If you want to increase your chances of getting coverage, time the release for Monday to Thursday when more reporters are on-shift and can more easily gain attention from public officials and other interested parties.

Before sending out your press release, understand the constraints all newsrooms face: tight deadlines, shrinking staff levels, and reporters who are increasingly inexperienced and lacking institutional knowledge – all with the expectation to file multiple stories a day. Knowing this, craft a press release with a clear "hook" and in plain language (imagine you're explaining the issue to an eight-year-old).

Don't shy away from conflict.

Editors love conflict, so play this up when possible. This does not mean you have to overly criticize the current government (nonprofits are in a difficult position because funding often comes from public sources and being diplomatic may be more prudent). Instead, frame the issue in a way that editors and reporters, and by extension the public, will understand how this issue would impact them. For example, a lack of affordable housing leads to more people living on the street, which means more money will be needed for police and other public services to keep people off the streets, which leads to tax increases – avoidable expenditures if affordable housing units were just built initially. To further validate your point in your press release, you might also highlight how fiscally conservative policies, such as cuts to affordable housing support, can be contradictory when considering the unintended cost increases that come as a result.

Put a face to your issue.

While your staff spokesperson will likely be replying to most media requests, your issue might also benefit from real people sharing their stories. To bring your story to life, confirm availability for someone impacted by the issue to speak to reporters the day you issue the press release. You will save reporters' time to track down a subject for the story and by having someone readily available who can comment. Saving this time increases the odds your story will make the news that day. If you are having people share their stories– ideally while you are present, you should determine in advance if they are comfortable to have their name and every detail of their story included, or if they want to remain anonymous and/or have certain details omitted.

Find a slow news day.

Your press release will be more likely get attention if there is less going on in the newsroom. If you are not promoting a specific event, or are tied to a certain day, consider what else is happening and avoid major local, provincial, and national events. For example, carefully reconsider sending out a release when the Prime Minister is in town, unless your issue is federally related.

Block off a day for media with your staff spokesperson.

If you are going to send out a press release, be prepared for a response. You might need to respond to a full day of interview requests across a variety of mediums, and have your nonprofit's spokesperson available for phone and in-person interviews for print, online, radio, and television. For small nonprofits, it is likely that your CEO will have hands-on knowledge and experience to handle all media interviews. However, if your nonprofit is larger, you should consider identifying the thought leadership of other team members to be spokespeople as well.

Make trusted media contacts and nurture those relationships.

Spend time getting to know media contacts and become a valuable resource for them. You do not always have to be on record, sometimes journalists need background information and news tips from reliable sources they can count on. In turn, they can be valuable resources for your nonprofit – just remember to respect their time.

Contact information for journalists is usually readily available – do a little research and find journalists who are writing about topics related to the issues you want to highlight, get in touch and even consider taking them for coffee to discuss mutual interests.

Don't be afraid to try media engagement!

One news story may go a long way towards maximizing your impact and advancing your advocacy efforts.

CLICK TO DOWNLOAD PRESS RELEASE TEMPLATE

RETURN TO TABLE OF CONTENTS

References

[1] Gibbins, Roger. (2016). The Moral Imperative for Policy Advocacy. https://thephilanthropist.ca/2016/02/the-moral-imperative-for-policy-advocacy/

[2] Metcalf Foundation. (2018). Metcalf Interview John Stapleton. https://metcalffoundation.com/stories/metcalf-stories/metcalf-interview-john-stapleton/

[3] Gibbins, Roger. (2018). New Horns, Old Dilemmas: Policy Engagement in a Polarized Environment. https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/5bb29145f4e1fcc82ad1c999/1538429254731/Rogers+Gibbins+New+Horns_Old+Dilemmas+speech_091918.pdf

[4] Ibid.

[5] Bolder Advocacy. (2018). Advocacy is a Powerful Catalyst for Change: Stories. https://www.bolderadvocacy.org/all-stories/

[6] Statistics Canada. (2019). Non-profit institutions and volunteering: Economic contribution, 2007 to 2017. https://www150.statcan.gc.ca/n1/daily-quotidien/190305/dq190305a-eng.htm

[7] Government of Alberta. (2018). Open Data: Alberta Nonprofit Listings. https://open.alberta.ca/opendata/alberta-non-profit-listing

[8] Government of Alberta. (2018). Alberta's Nonprofit and Voluntary Sector. https://www.alberta.ca/albertas-non-profit-voluntary-sector.aspx

[9] Alberta Non-profit/Voluntary Sector Initiative. (2018). Profiling the Nonprofit/Voluntary Sector in Alberta. https://open.alberta.ca/dataset/99071990-cfbc-4409-9ca5-a25292582f2a/resource/1a736968-dfdb-4222-a937-a7de0c07ec0b/download/profiling-the-nonprofit-voluntary-sector-in-alberta-anvsi.pdf

[10] CCVO. (2014). Alberta Nonprofit Sector Fact Sheet. https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/5b31ad168a922d9284bf5dce/1529982247429/ABNPSectorFactSheet_1pager.pdf

[11] Government of Canada. (2019). Public Policy Dialogue and Development Activities by Charities. https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/public-policy-dialogue-development-activities.html

[12] Nonprofit Vote. (2018). Nonprofits, Voting & Elections: A Guide to Nonpartisan Voter

[13] Government of Canada. (2019). Public Policy Dialogue and Development Activities by Charities. https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/public-policy-dialogue-development-activities.html

[14] Government of Canada. (2019). Guidelines for registering a charity: Meeting the public benefit test. https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/policy-statement-024-guidelines-registering-a-charity-meeting-public-benefit-test.html

[15] Government of Canada. (2019). Public Policy Dialogue and Development Activities by Charities. https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/public-policy-dialogue-development-activities.html

[16] Department of Finance Canada. (2018). Explanatory Notes Relating to the Income Tax Act and to Other Legislation. https://www.fin.gc.ca/drleg-apl/2018/bia-leb-1018-n1-eng.asp

[17] Office of the Ethics Commissioner. (2018). Am I a Lobbyist and What is Lobbying? https://www.albertalobbyistregistry.ca/i/themes/itrac_theme/ext/Am_I_a_Lobbyist_2018_v5.pdf

[18] Office of the Ethics Commissioner. (2016). Alberta Lobbyist Registry. https://www.albertalobbyistregistry.ca

[19] IntegralOrg. (2020). Lobbying Toolkit. https://integralorg.ca/toolkits/lobbying-toolkit/

[20] Elections Alberta. (2018). Election Third Party Advertisers. https://www.elections.ab.ca/third-party-advertisers/third-party-advertisers/

[21] Ibid.

[22] Department of Finance Canada. (2018). Explanatory Notes Relating to the Income Tax Act and to Other Legislation. https://www.fin.gc.ca/drleg-apl/2018/bia-leb-1018-n1-eng.asp

[23] Ibid.

[24] Office of the Commissioner of Lobbying in Canada. (2019). A Significant Part of Duties ("The 20% Rule") https://lobbycanada.gc.ca/eic/site/012.nsf/eng/00115.html

[25] Office of the Commissioner of Lobbying in Canada. (2019). Frequently Asked Questions. https://lobbycanada.gc.ca/eic/site/012.nsf/eng/00884.html

[26] Office of the Commissioner of Lobbying in Canada. (2019). Applicability of the Lobbying Act to Grass-roots Communications. https://lobbycanada.gc.ca/eic/site/012.nsf/eng/00874.html

[27] Office of the Commissioner of Lobbying in Canada. (2019). Are You Required to Register in the Federal Registry of Lobbyists? https://lobbycanada.gc.ca/eic/site/012.nsf/eng/h_01085.html

[28] IntegralOrg. (2020). Lobbying Toolkit. https://integralorg.ca/toolkits/lobbying-toolkit/

[29] Elections Canada. (2019). Third Party Expenses Limits. https://www.elections.ca/content.aspx?section=pol&document=index&dir=thi/limits&lang=e

[30] Elections Canada. (2019). Third Party Roadmap. https://www.elections.ca/pol/thi/s.ca/content.aspx?section=pol&dir=tra/fin/thir/co28&document=index&lang=e

[31] Elections Canada. (2019). Political Financing Handbook for Third Parties, Financial Agents and Auditors. https://www.elections.ca/content.aspx?section=pol&dir=can/man/ec20155_c76&document=index&lang=e

[32] CCVO. (2018). Lighting the Way: The State of the Alberta Nonprofit Sector 2018. https://www.calgarycvo.org/state-of-the-alberta-nonprofit-sector

[33] Marketing Science Institute. (2015). The Power of Sensory Marketing in Food Ads. http://www.msi.org/articles/the-power-of-sensory-marketing-in-food-ads/

[34] Christiano, A. & Neimand, A. (2018). The Science of What Makes People Care. Stanford Social Innovation Review 16, no.4: 2-9.

[35] CCVO. (2018). Policy Brief: Succeeding Together. https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/5c51d26e032be4181420345a/1548866158319/Policy+Brief_CCVO+Agenda.pdf

empowering
nonprofits