
Federal Election Nonprofit Advocacy Guide



CANADIAN
FEDERAL
ELECTION

2021

Welcome

The Federal Election Nonprofit Advocacy Guide is a practical guide for those wishing to engage in advocacy during the 2021 federal election; it will help inform a range of nonprofit stakeholders, including executive directors, staff, board members and volunteers. The Guide contains valuable information about the context, rules, and strategies that can be used to support nonprofit contributions to public policy dialogue and development.

The goal of this Guide is to give more information on the importance of advocacy and the role nonprofits play (chapter 1) while providing knowledge on navigating the federal government (chapter 2) and resources for the nonprofit sector to advocate, leading up to the federal election on September 20, 2021. While at the same time, keeping in mind the rules and regulations currently in place (chapter 3). The Guide will provide tips on making your policy priorities more visible in a coordinated and strategic manner (chapter 4) and bringing awareness to your causes by engaging with media outlets (chapter 5) during election time. However, it's important to keep in mind that after an election, it's time to start focusing your policy priorities and planning your advocacy efforts for the future (chapter 6).

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.

First created in August 2019 by CCVO and updated in August 2021, this Guide is based on what we know today. It will be updated to best reflect any policy changes that occur leading up to the 2021 federal election. Readers are encouraged to confirm that the information presented in the Guide is still accurate post-election. 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.

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Chapter 1:

THE IMPORTANCE OF ADVOCACY AND THE ROLE 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 but also bring benefits to the organization through opportunities of attracting greater attention and creating broader impact. To demonstrate the collective impact of nonprofits on Canadian society and the economy, this chapter also highlights three major contributions of the sector.

Why Advocacy?

Canadian nonprofits play a crucial role in communities across all provinces and territories. The nonprofit sector contributes significantly to society, the economy, and democratic participation across the country. For the upcoming 2021 federal election, it is essential for nonprofits to realize the vital role they play in influencing public policy.

Advocating as a nonprofit is an opportunity to share priorities with the public, represent communities, advance policies, and promote funding of meaningful objectives. Issues and challenges facing the nonprofit sector can be raised during this election in order to promote important policy decisions as nonprofits play an important role advocating for important policy objectives, often for the most vulnerable and underserved populations across Canada.

[CLICK TO DOWNLOAD CCVO'S PRESENTATION:
'THE CASE FOR NONPROFIT ADVOCACY'](#)

[CLICK TO DOWNLOAD CUSTOMIZABLE PRESENTATION:
'THE CASE FOR NONPROFIT ADVOCACY'](#)

Advocacy Benefits the Public and Nonprofit Sector

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 citizen satisfaction, organizations that deliver programs can provide more thoughtful feedback on the way policies and programs are experienced in practice.¹

Public consultations are a key element of effective policy making; without the advocacy work and input of nonprofits, policymakers would miss out on valuable contributions needed for evidence-based decision making. Additionally, nonprofits provide a platform for those with diverse interests and a voice to the most vulnerable and underrepresented in society, who may otherwise remain silent in the policy process.

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 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 (for example, public support and charitable giving) of a nonprofit as it works toward a more diverse and effective approach to achieving societal impact. It also creates opportunities to collaborate and build alliances with other organizations in order to provide a greater impact. When nonprofits come together, they can avoid working in silos and capitalize on the benefits of a network approach to achieve a greater impact.

Why Nonprofits Matter

1. Nonprofits Contribute to Our Social and Cultural Fabric

The nonprofit sector plays a vital role in contributing to the social and cultural fabric in our society. Nonprofits in Canada are incredibly diverse and enrich Canada'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, and health, among others.

Unique in their direct work with community groups, nonprofits serve diverse populations and 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 Play a Critical Role Within Our Economy

Nonprofits play a critical role within our economy. Canada's nonprofit sector is the second largest in the world, employing 2.4 million people.² There are more than 170,000 nonprofit organizations in Canada that represent 10.5% of the labour force and 8.5% of Canada's GDP.³

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 continues to contribute to the economic wellbeing of the province.

In Alberta, the sector is comprised of:

- More than 26,000 nonprofits⁴
- Nearly \$10 billion in GDP annually⁵
- 450,000 employees⁶
- 262 million annual volunteer hours⁷

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 the needs of their communities. This provides a platform for nonprofits to engage in advocacy relevant to their cause. Despite the importance of democratic participation, nonprofits have a longstanding hesitation towards policy advocacy, with some organizations even distancing themselves entirely to avoid risking their charitable status. Recent changes have been made in legislation to address these concerns and encourage nonprofit participation in public policy advocacy (chapter 3).

Policy advocacy should not be treated as an end destination. Your efforts should continue beyond election periods, with a continued 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. After an election, nonprofits have an opportunity to focus and prioritize their policy work and plan their advocacy efforts (chapter 7). If a specific policy proposal finds its way into a political party's election platform, it's often the result of a lot of hard work in the months, and even years, prior to an election.

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 figures)



450,000
nonprofit employeesⁱⁱⁱ
(211,500 full-time and 238,500 part-time)

Sources

ⁱProfiling Volunteerism: An Alberta Nonprofit/Voluntary Sector Initiative Discussion Paper of the Value and Contribution of Alberta Volunteers (2020)

ⁱⁱStatistics Canada General Social Survey on Giving, Volunteering and Participating (2013)

ⁱⁱⁱANVSI: Profiling the Nonprofit and Voluntary Sector in Alberta (2018)

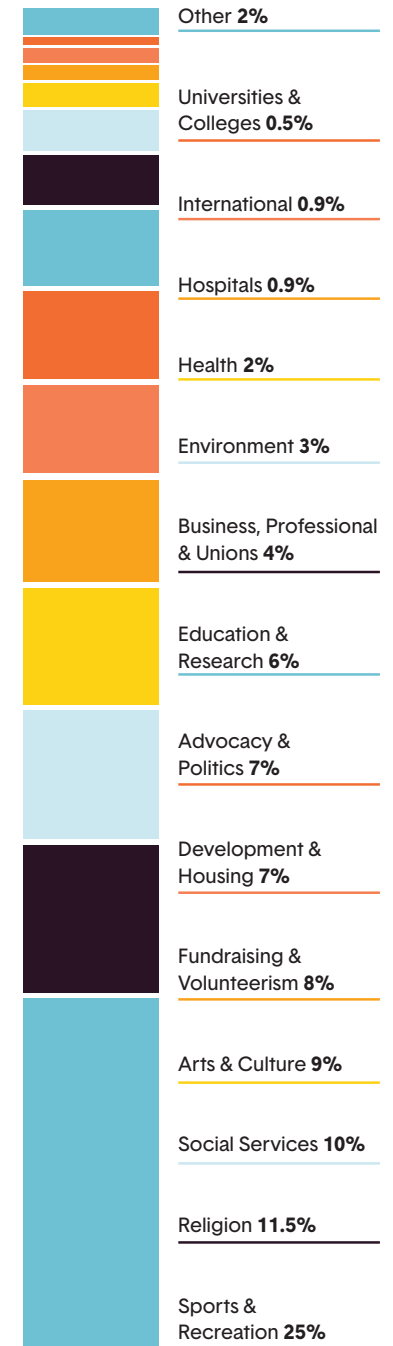
[CLICK TO DOWNLOAD 'THE ALBERTA NONPROFIT SECTOR INFOGRAPHIC'](#)

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26,000+

nonprofits across
Alberta represent several
subsectors, including:



Chapter 2:

NAVIGATING THE CANADIAN GOVERNMENT

You can empower your nonprofit to engage with the Federal Government by knowing more about the types of decisions it makes, and the services and programs it provides. Being aware of the appropriate avenues to address policy concerns is one of the first steps towards effective advocacy and engagement for your nonprofit. This knowledge can elevate your advocacy efforts by ensuring the actors targeted are well positioned to listen, consult, and provide actionable solutions to your concerns.

The Federal Government is responsible for creating legislation in areas that affect the entire nation. There are three branches within the federal government: **the executive, legislative, and judicial**. The executive branch consists of the Prime Minister and Cabinet, including the Public Service that supports the government in developing, implementing and enforcing policies. The legislative branch of government consists of the Senate and the House of Commons. The judicial branch is composed of courts that interpret laws. Each branch serves a different role in policy and decision-making, approving relevant legislation, and providing programs and services to citizens.

The Executive Branch

Canada is a constitutional monarchy with a parliamentary government meaning that the Queen (or King) is the formal Head of State, which is a largely symbolic role. The Queen is represented by the Governor General, who is appointed by the Queen on the Prime Minister's advice. This appointment is for a term of five years and can be renewed. The Governor General's duties include summoning, opening and ending sessions of parliament, reading the Speech from the Throne, giving Royal Assent to bills, signing state documents, and dissolving Parliament before elections. The Prime Minister is the Head of Government, meaning that the elected governing party makes decisions on behalf of Canadians.⁸

The Prime Minister, along with the Cabinet Ministers and Members of Parliament, decide on policies, and legislation in the areas of national defence, foreign affairs, employment insurance, banking, federal taxes, the post office, fisheries, transport, Indigenous lands and rights, and criminal law.

The Cabinet

Cabinet Ministers act as advisors for the Prime Minister in different departments or ministries. They are selected from among elected members of the governing party by the Prime Minister.

New laws are advanced by the Prime Minister and Cabinet Ministers and are introduced as bills in the House of Commons. Details of proposed bills are debated and amended by House Committees. They are then voted on in the House of Commons and sent to the Senate thereafter for approval.

Cabinet Ministers, along with the Prime Minister, are collectively responsible for federal government policy. The size of the Cabinet is based on the number of departments the Prime Minister decides upon. There are departments for the environment, Canadian heritage, foreign affairs, justice, immigration, transport, public works, finance, Royal Canadian Mounted Police, and national defence and Canadian armed forces, among others.

The Legislative Branch

The Canadian Parliament is split into two chambers; the House of Commons and the Senate. The legislative branch is responsible for debating, amending, and approving proposed legislation and policies.

The House of Commons

The House of Commons (the "House" or "lower house") currently has 338 elected members, or Members of Parliament (MPs), who often belong to political parties. MPs belonging to one political party are known as that party's "caucus" in the House. Members of the same caucus usually vote together.⁹ The House is the lawmaking body in Parliament where there are various debates and discussions between the governing party, the Official Opposition, and other parties and MPs.

Every four years, MPs are elected in a general election. They represent 338 different electoral districts, also known as constituencies or ridings, across Canada. The larger provinces have more elected members than smaller provinces because of the principle of representation by population (rep-by-pop).¹⁰ MPs are responsible for reviewing and debating bills that affect the country, representing their riding by raising issues of importance, taking part in the daily question period, providing statements about various events, and making recommendations for public policy.

| DISTRIBUTION OF HOUSE OF COMMONS SEATS | | | |
|--|-----|---------------------------|------------|
| NUMBER OF SEATS BY PROVINCE/TERRITORY | | | |
| Ontario | 121 | New Brunswick | 10 |
| Quebec | 78 | Newfoundland and Labrador | 7 |
| British Columbia | 42 | Prince Edward Island | 4 |
| Alberta | 34 | Northwest Territories | 1 |
| Manitoba | 14 | Nunavut | 1 |
| Saskatchewan | 14 | Yukon | 1 |
| Nova Scotia | 11 | TOTAL SEATS | 338 |

Source: Parliament of Canada¹¹

The Legislative Branch - Continued

The Senate

The Senate, or “upper house” consists of 105 members who are appointed by the Prime Minister. Before a bill can become law, it must be passed by the Senate. Senators study, amend, and either reject or approve bills passed by the House.

Although Senators are not elected, there are particular **assessment criteria** in place for eligibility. Senators come from various professional, ethnic, socio-economic and cultural backgrounds to represent minority groups. Additionally, appointments are designed to represent the different regions of Canada to balance the power of the House of Commons by appointing Senators to represent regions with small populations that do not have strength-by-numbers in the House of Commons.¹²

The current government introduced a system to appoint independent Senators named by a nonpartisan review panel. Of the sitting senators, 40 are members of the **Independent Senators Group**, 19 are members of the Conservative Party of Canada, 12 are members of the Canadian Senators Group, 11 are members of the Progressive Senators Group, 13 are non-affiliated, and ten seats are currently vacant.¹³

| DISTRIBUTION OF SENATE SEATS | | | |
|---------------------------------------|----|---------------------------|------------|
| NUMBER OF SEATS BY PROVINCE/TERRITORY | | | |
| Ontario | 24 | Saskatchewan | 6 |
| Quebec | 24 | Newfoundland and Labrador | 6 |
| New Brunswick | 10 | Prince Edward Island | 4 |
| Nova Scotia | 10 | Northwest Territories | 1 |
| Alberta | 6 | Nunavut | 1 |
| British Columbia | 6 | Yukon | 1 |
| Manitoba | 6 | TOTAL SEATS | 105 |

Source: Parliament of Canada¹⁴

The Judicial Branch

The judicial branch consists of the courts across Canada including federal and provincial courts. There are different levels of courts including: Supreme Court of Canada, the Federal Court of Appeal, provincial and territorial courts of appeal, and provincial and territorial courts (lower courts).¹⁵ Each level has authority over specific types of cases.

The courts are comprised of judges who are responsible to interpret and apply the law in various cases. Judges are appointed by either the provincial government (provincial court judges) or by the federal government (federal judges, appeals court judges, and Supreme Court judges).¹⁶ The premise of the courts is its impartiality, which essentially derives from its independence from the executive and legislative branches.

The Public Service

The Public Service of Canada is the country’s single largest employer consisting of over 280,000 employees all over Canada; it is divided into various administrative units such as departments, agencies, commissions, and other federal organizations. The Prime Minister and Cabinet Ministers oversee these departments as part of the executive branch of government.

Public servants perform policy, legal, and administrative duties needed to deliver programs and services to Canadians. They are non-partisan, meaning they do not represent a political party. These are not elected positions; rather, public servants are professional administrators and continue in their roles even when elected governments change. These positions are hired from within the Public Service, or through external processes open to the public.

The Electoral Process

Federal elections occur every four years. They are formally announced by the Governor General, who by the advice of the Prime Minister, dissolves the current Parliament for an election.

Canada has a representative government, with candidates for office contesting election in separate electoral districts (aka constituencies or ridings). These candidates are generally affiliated with a political party. Canada follows the first-past-the-post electoral system for all federal elections. Within this system, candidates who get the most votes become the winning candidate in that electoral district. The winning candidates – MPs – are given a seat in parliament and act as the representative for their electoral district. The party with the most members is generally recognized as the new government, and the leader of the party becomes the Prime Minister. In the event of a minority government, when no party wins a majority of seats, the leader of a party that commands the confidence of the House* is given a chance to govern.¹⁷

The Prime Minister chooses members of his party to form a ministry, or Cabinet. Cabinet Ministers are MPs who oversee the various government departments in the executive branch of government, such as finance, foreign relations, or healthcare (see section on the Cabinet).

The party with the second most seats in the House of Commons is generally called the Official Opposition. The Official Opposition acts as a watchdog and holds the governing party accountable for its policies and actions. The Leader of the Opposition appoints a shadow cabinet (or critics) from their party to critique the government of the day.¹⁸

Majority governments are formed when a political party wins most of the seats in the House. Minority governments are formed when no political party wins the most seats in the House.

* The Prime Minister and Cabinet are responsible to have consent and approval, “confidence” of a majority of the Members of House of Common. If the Prime Minister does not have the confidence of the House, they must provide their resignation to the Governor General.

Relationship Between Nonprofits and the Canadian Government

The Federal Government, like all levels of government, is intrinsically linked to nonprofits. It provides resources and support to nonprofits that help them to effectively accomplish their mission and initiatives, examples of this include:

- Providing programs and services that support communities.
- Providing grants, awards and other types of funding models.
- Leading key research and innovation initiatives.
- Partnering on educational and awareness campaigns.
- Providing a provincial platform to share ideas and perspectives.

Nonprofits should make efforts to build and establish relationships with public servants in the federal government. Fostering these relationships allows for open communication and can streamline the sharing of information. Furthermore, public service employees are not elected officials, so even if the government changes through an election, nonprofits may continue to benefit from the relationships that have been built with public servants.

It is important to remember that nonprofits are free to engage with MPs, cabinet ministers, and public servants. However, there are certain rules in place, for charities in particular, and the next chapter, *Rules of Engagement*, will discuss the rules for nonprofit advocacy.

Three Levels of Government: Who Does What?

Understanding the different levels of government and strategically addressing concerns to the right level, will go a long way to ensure your nonprofit achieves its advocacy goals.

To clarify these roles, the chart to the right lays out the high-level responsibilities of each level of government. Note that some responsibilities, such as environmental management, are the responsibility of more than one level of government.

[CLICK TO DOWNLOAD
'THREE LEVELS OF GOVERNMENT: WHO DOES WHAT?'](#)

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THE FEDERAL GOVERNMENT addresses the needs of all Canadians, examples including:

- Aboriginal Laws and Rights (overlaps with provincial government)
- Canadian Pension Plan and Old Age Security
- Employment Insurance Benefits
- Income Tax Act
- Criminal Law
- Immigration Policies (overlaps with provincial government)

THE PROVINCIAL GOVERNMENT places its primary concern on the needs of Albertans, examples including:

- Education and Training
- Health Programs, Services and Regulations
- Family and Social Services
- Employment and Labour Standards

THE MUNICIPAL GOVERNMENT aims to handle issues facing citizens living within defined municipalities and local communities, examples including:

- Affordable Housing (overlaps with federal government)
- Community and Youth Services
- Public Transportation and Parking Bylaws
- Libraries, Parks and Public Spaces
- Waste and Water Management

Chapter 3:

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.

An election is a great opportunity to advocate for public benefit. As our friends at the [Ontario Nonprofit Network](#) say, “Don’t be intimidated by rules and regulations about what charities and nonprofits can do during elections. Get informed!”¹⁹ The first steps to becoming informed, involve the understanding of three relevant regulatory areas:

1. Canada Revenue Agency Regulations
2. Lobbying
3. Third-Party Advertising

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

Canada Revenue Agency's Regulations for Charities

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.²⁰

Non-partisanship does not mean non-participation. There are many ways that registered charities can engage in nonpartisan election-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 whom your charity serves.
- Give you access to diverse community leaders and funding sources.
- Reaffirm nonprofits' position as trusted sources that can engage with and give voice to underserved populations and topics, beyond party lines.²¹

As Canadian citizens, staff and volunteers have a right to participate in the democratic process.²² 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.²³
- ✓ review legal requirements of other legislation such as Canada 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](#).²⁴ Please click [here](#) for Explanatory Notes Relating to the Income Tax Act Legislation.²⁵

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.²⁶

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.²⁷
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.²⁸ In-house nonprofit lobbyists must register within two months of the beginning of their lobbying activities.²⁹

* 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.³⁰

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.³¹



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.³²

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 Questions and Answers for Third Parties.³³ Click [here](#) for a video resource on registering as a Third Party.³⁴ For more information about registering, click [here](#).³⁵

| 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. |

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Chapter 4:

DEVELOPING AN ELECTION ENGAGEMENT STRATEGY

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 toward achieving longer term advocacy goals.

Focus on Your Goals and Choose Your Tactics

The more time you spend setting your policy agenda 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 political candidates 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 Political Landscape

It will be important to stay connected to news outlets, political party websites, and community interests to keep tabs on when important information becomes available, and when political candidates 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. Start your planning early and focus on the weeks leading up to the election (voting takes place between 36 to 50 days after the date of the writ).

While it is important to be organized and to 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 ³⁶

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

TIP: A 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. Be sure to include the elements of a story: 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.³⁷ For example, the simple use of the word “sweet” draws a stronger response than “kind” and the same for “bitter” compared to “mean.”³⁸



Are your calls to action clear and specific?

TIP: If your target audience is not clear on how the proposed solution will help solve the problem, and how they can play a role in the solution, the call to action will likely not be effective. For example, instead of asking people to end climate change, the call to action should be something people know how to do, like 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 potential decisionmakers to deciding. For example, instead of asking the federal government to support nonprofit technology adoption in general, CCVO has specifically suggested extending the Canadian Radio-Television and Telecommunications Commission's Broadband Fund to incorporate nonprofit organizations – an approach that identifies an established funding source and an opportunity to include the needs of the nonprofit sector.

[CLICK TO DOWNLOAD THE 'ENGAGEMENT STRATEGY TOOLBOX'](#)

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| ENGAGEMENT STRATEGY TOOLBOX | | |
|--|--|--|
| TACTIC | OPPORTUNITY | CONSIDERATIONS |
| Hosting an all-candidates forum | Nonprofits are well-positioned to sponsor forums and increase public understanding of the election process and candidates who are running. | Candidates are usually more willing to attend when: <ul style="list-style-type: none"> • they have clear positions on issues • they expect a large audience • there is guarantee of neutrality |
| Attend candidate forums hosted by others | Many of these forums 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. |
| Platform analysis | Reviewing party platforms, assessing what they 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. | Political parties may choose to share party platforms at different times and in different formats - check the CCVO website as we follow these developments. |
| Sharing resources and background materials with candidates | This is a great way to educate candidates about your issues, your constituency, or your community. Candidates rely on you to educate them about your issues. | You may share research and your policy priorities with candidates, and ensure that the same information is available to all candidates. |
| Attending meetings with individual candidates | These meetings can be helpful when a candidate's opinion is different from yours - to let the candidate know that there is an alternative and organized viewpoint. | Make sure to: <ul style="list-style-type: none"> • 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. |
| Get out the vote | Nonprofits have played, and continue to play, an essential role in the weeks leading up to elections. Traditionally marginalized groups (younger, diverse, low income) are often supported by nonprofits through access to information about how to vote and transportation to polling stations, among other supports. | When political candidates recognize the voting power of the nonprofit sector, they are more likely to listen to our issues and concerns. This is our opportunity to engage new voters and show power in numbers. Check the CCVO website for resources on voter engagement. |

Chapter 5:

TIPS FOR ENGAGING WITH THE MEDIA

One tactic to consider within your engagement strategy is engaging with media outlets. 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).

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.

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.

Find what is likely to be a slow news cycle.

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](#)

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Chapter 6:

AFTER THE ELECTION, THE REAL WORK BEGINS

Following the election, while the shock waves of the campaign still echo, it's time to start focusing your policy priorities and planning your advocacy efforts for the future. That's when the real work begins.

Advocacy After the Election

During the 1993 federal election campaign, Prime Minister Kim Campbell was pointedly asked a question by a journalist about a detailed and complex policy matter. She responded by saying that this wasn't the time to get involved in a debate about serious issues. Afterwards, she was roundly criticized for speaking the truth.

While it may have been unwise for a political leader to point this out, the reality is that election campaigns are typically dynamic contests shaped by emotions and nuance. And while political parties usually put considerable effort into building their election platforms, the outcome of a campaign is often decided more by the overall mood of the electorate and the personalities of candidates and party leaders.

This is not to say that policy advocacy doesn't matter; rather, it's important to recognize that advocacy efforts need to start well before the advent of an election campaign –and continue afterwards as well. After all, policy advocacy is a journey, not a destination. If a specific policy proposal finds its way into a political party's election platform, it's often the result of a lot of hard work in the months, and even years, prior to an election. And if a party wins the election, it is generally assumed that its governing mandate includes the policy proposals it campaigned on.

Five critically important ways for nonprofits to follow up after the election:

- 1. Offer congratulations and thanks.** Political parties and candidates required some encouragement and support following the election. The victorious party and all successful candidates should be congratulated. Other parties and unsuccessful candidates should also be thanked for their contributions to the democratic process. The importance of such courtesies is bolstered by the importance of relationships not only in the immediate aftermath of an election campaign but also for the future. The next election is only four years away!
- 2. Look for ways to help.** The party that wins the right to govern will need some help. It might have a well thought out policy platform, but will need some assistance in implementing these ideas. This is where working constructively with elected representatives, political staff, and the public service become vitally important. Non-governmental stakeholders are increasingly valuable for elected governments seeking public acceptance for their various initiatives. In fact, it's difficult for any government to proceed with a bold policy agenda unless it can demonstrate broad public support.

- 3. Leverage your credibility.** In an age of political polarization and growing distrust of institutions, nonprofit organizations are particularly well positioned to work in collaboration with policymakers. Nonprofits are among the most trusted groups in our society. And they collectively represent one of the largest and most important sectors of our province, contributing approximately \$10 billion to Alberta's GDP and \$169 billion to Canada's GDP. With more than 26, 000 nonprofits in Alberta and 170, 000 in Canada working to make every community in our country stronger, elected representatives are increasingly aware that this vital sector can't be taken for granted.
- 4. Engage, regardless of who wins.** What if the election results are disappointing to you personally? Changes in government are always challenging, especially if you don't support the winning party or respect the leader. A natural reaction might be to brace for the worst. However, that emotional response could actually contribute to negative consequences. On the other hand, most new governments are seeking ideas and allies. This is a perfect opportunity for relationship-based advocacy. In fact, many nonprofit leaders have noted that the big policy changes they've been associated with have come from so-called unsympathetic governments.
- 5. Stand your ground.** Stand your ground. In the aftermath of an election, while some are celebrating the joys of victory and others are licking their wounds in the disappointment of defeat, stand your ground. Regardless of whether the party you supported has triumphed or been vanquished, don't give up. For you will have allies waiting for you in cabinet, in caucus, and in the public service. Your members, supporters and stakeholders will need you to be more clearheaded and caring than ever.

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