



ALLIANCE FOR JUSTICE  
**NONPROFIT ADVOCACY PROJECT**  
**2008/2009 TRAINING WORKSHOPS**

Alliance for Justice has collaborated with hundreds of nonprofit organizations, working with their leaders, staff, and volunteers to understand the legal issues involved in public policy work. Alliance for Justice workshops are tailored to meet your organization's needs. Our attorney-trainers use interactive PowerPoint presentations and skills training to enable participants to plan their programs more effectively.

## **WORKSHOP TOPICS**

### **Being a Player: The Lobbying Rules for Nonprofits\***

501(c)(3) public charities are eager to learn to what extent they can lobby so that they can be “players” in their communities.

- *What is the 501(h) election?*
- *How much lobbying can a 501(c)(3) do?*
- *What is the definition of lobbying?*
- *May a 501(c)(3) group endorse or oppose a ballot measure?*

This session complements the popular *Being a Player: A Guide to the IRS Lobbying Regulations for Advocacy*.

\* This session is available in a bilingual format with Spanish-translated fact sheets and guidance.

### **Add-On to Being a Player: Recordkeeping for Nonprofit Advocates\***

You know the rules for nonprofit advocacy, but how can you setup a system to track your organization's lobbying activity for reporting to the IRS? This workshop demonstrates simple techniques for tracking your organization's lobbying and other advocacy activities.

- *How can a 501(c)(3) public charity track staff time spent on lobbying?*
- *What portion of a 501(c)(3)'s rent is a lobbying expenditure?*
- *How do you track lobbying in communications that are only partially lobbying?*

This session is designed primarily for people who have already attended the Alliance's *Being a Player* workshop or who are otherwise familiar with the laws governing lobbying by 501(c)(3) public charities who have made the 501(h) election.

\*This session is available in a bilingual format with Spanish-translated fact sheets and guidance.

### **Rules of the Game: Nonprofits and Election-Year Advocacy**

If you are planning election-related activities, you need this workshop! It reviews the federal tax and election laws affecting the political activities of tax exempt organizations in an election year, from voter registration to candidates' forums.

- *May a 501(c)(3) group pay for or distribute voter guides?*
- *May a 501(c)(3) group organize issue briefings for candidates running for public office?*
- *What can a 501(c)(4) do during an election year?*

This session complements Alliance for Justice's publication *The Rules of the Game: An Election Year Legal Guide for Nonprofit Organizations*.

## **Coalitions and Affiliated Organizations**

Learn the different roles and functions of 501(c)(3)s, 501(c)(4)s, and Political Organizations, and how these types of organizations can work together to maximize your effectiveness in influencing public policy.

- *Can a 501(c)(3) work jointly with a 501(c)(4) or political organization on a voter registration drive?*
- *Can a 501(c)(3) create a 501(c)(4) to do more lobbying?*
- *How do you show the IRS that an affiliated 501(c)(3), 501(c)(4) and PAC are separate organizations?*

This session complements Alliance for Justice's publication *The Connection: Strategies for Creating and Operating 501(c)(3)s, 501(c)(4)s, and Political Organizations*.

## **Seize the Initiative: Nonprofit Organizations and Ballot Measure Campaigns**

Increasingly tax-exempt organizations are on the front lines of ballot measure campaigns. In promoting their policy agendas, these groups need to understand the laws governing initiatives and referenda.

- *May a 501(c)(3) group endorse or oppose a ballot measure?*
- *May a 501(c)(3) organization contribute money to a ballot measure campaign?*
- *How may a 501(c)(3) organization work in a coalition with a 501(c)(4) or PAC on an initiative?*

This workshop complements the guide *Seize the Initiative*.

## **Game Plan**

This workshop helps organizations strategize how best to employ the advocacy tools at their disposal. The session begins with a discussion of advocacy fundamentals helping participants define their goals and objectives, appropriate targets, and effective advocacy tools. Through an interactive session, participants discuss how to create their own advocacy plans which requires them to consider strategies to build coalitions, influence public perception, and persuade policymakers. The session includes a discussion of assessing advocacy capacity and ends with a note on evaluating advocacy activities and planning for future campaigns. This curriculum complements our discussion on the lobbying rules.

## **Worry-Free California Ballot Measure Disclosure Laws**

Ballot measure advocacy by nonprofits isn't just legal - it's important, powerful, and fundamental to democracy. Many groups say they don't understand what they can do around ballot measures or think that the ballot measure reporting requirements are too difficult. This training will help to demystify the ballot measure process by helping groups understand:

- *The limits placed on their ballot measure advocacy by federal tax law;*
- *The California ballot measure disclosure reporting laws, including when and how to file the required reports; and*
- *How to safely raise money for work on ballot measures.*

## **Nuts of Bolts of California Ballot Measure Record-Keeping and Reporting**

This training is designed for organizations already active in the California ballot measure process and will emphasize just how easy ballot measure disclosure can be. The training will show attendees how to develop systems for tracking the organization's ballot measure expenditures, what types of records the organization must maintain, and how to complete the required forms and disclose the organization's expenditures. This is a hands-on training and attendees will receive sample reports to help guide them in completing all of the necessary reports.

## **Worry-Free California Lobbying Disclosure**

Nonprofits can safely, legally and effectively engage in state-level advocacy and lobbying work in California, but they need to understand that their lobbying activities will be governed by not only federal tax law, but California state law as well. This training will provide attendees with information about California lobbying disclosure laws and how the California law covers activity that is both the same and different from the activity covered by the IRS's definitions of lobbying for 501(c)(3) public charities. It will also include an overview of the threshold levels of activity and expenditure that would cause an organization or its employees to have to register or file reports disclosing its California lobbying activities.

## **Nuts and Bolts of California Lobbying Record-Keeping and Reporting**

This training is designed for those that already have some exposure to California lobbying reporting and will cover in detail how to track time and expenditures on California lobbying activity, how to collect the information needed for these reports, and how to complete the required reports. This is a hands-on training and attendees will receive sample reports to help guide them in completing their own reports.

## **COSTS & SELECTION CRITERIA**

Costs are based on a flat fee structure. The flat fee covers preparation of a curriculum and PowerPoint presentation, 30 copies of the workshop materials (to include a copy of the relevant publication), and unlimited future technical assistance by telephone or email for all workshop participants. Travel costs are charged separately. Additional workshop materials may be purchased. Those costs range from \$7.50 to \$12.50 per participant.

For more information, contact the Nonprofit Advocacy Project at [advocacy@afj.org](mailto:advocacy@afj.org).

**Alliance for Justice • 11 Dupont Circle, N.W., 2<sup>nd</sup> Floor • Washington, DC 20036  
Ph: 202-822-6070 • Fax: 202-822-6068 • [advocacy@afj.org](mailto:advocacy@afj.org)**

**Alliance for Justice West Coast Office • 1611 Telegraph Ave., Suite 1006 • Oakland, CA 94612  
Ph: 510-444-6070 • Fax: 510-444-6078 • [advocacy@afj.org](mailto:advocacy@afj.org)**