

# Investing in Change

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How Funders Can Support and Engage in Advocacy

Abby Levine  
Director, Bolder Advocacy  
January 22, 2021



# Agenda

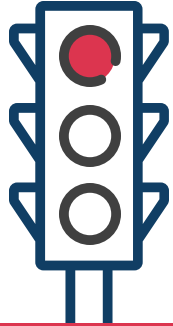
1. Characteristics of Public and Private Foundations
2. Lobbying Refresher
3. Engaging in Advocacy
4. Funding Advocacy

# Advocacy is not a standalone effort.

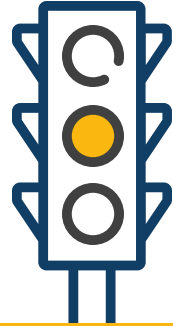


*“Is it something I said?”*

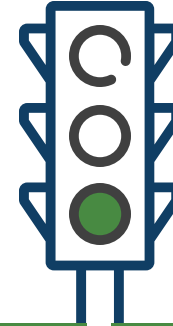
# Advocacy for 501(c)(3)s



Partisan  
Political



Lobbying



Organizing

Public  
Education

Nonpartisan  
Voter Ed.

Influencing  
Corporations

Educating  
Legislators

Educational  
Conferences

Lobbying  
Exceptions

Regulatory  
Efforts




Get to Know  
Legislators

Research

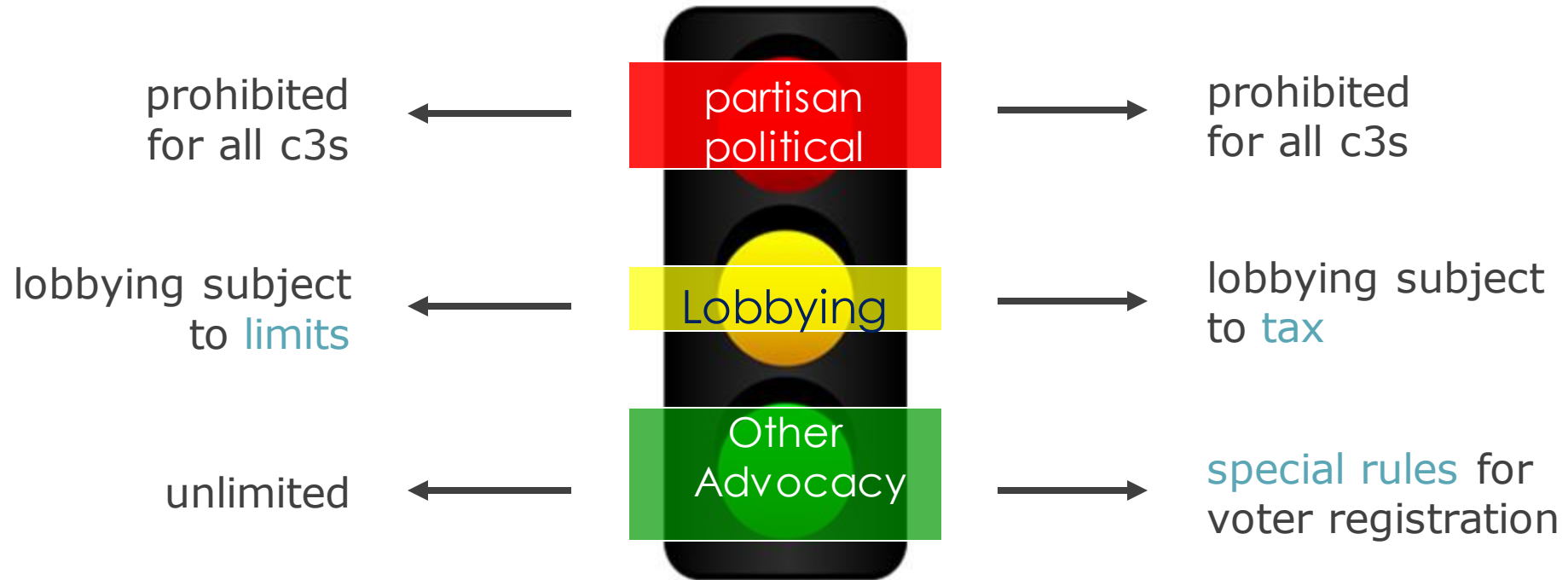
Training

Litigation

# Characteristics of Public and Private Foundations

	501(c)(3) <i>Private Foundations</i>	501(c)(3) <i>Community Foundations &amp; Public Charities</i>	501(c)(4) <i>Social Welfare Organizations</i>
Examples			
Tax Treatment	Tax-exempt Tax-deductible contributions	Tax-exempt Tax-deductible contributions	Tax-exempt
Lobbying Activities	Extremely Limited	Limited	Unlimited
Electoral Activities	Cannot support or oppose candidates	Cannot support or oppose candidates	Secondary Activity

# Foundation Advocacy Stoplight



Community Foundations

Private Foundations

# What is Lobbying?



# Measuring Lobbying

## Two options

1. Insubstantial Part Test
  - Default test
  - Vague definitions & limits
2. 501(h) Expenditure Test
  - Need to “elect” (form 5768)
  - Clear definitions & limits
  - Only expenditures count



# Calculating your lobbying limit under 501(h)

- Based on annual exempt purpose expenditures
- Most organizations can lobby up to 20% of their budget
- Lobbying cap limited: can only use up to 1/4 for grassroots lobbying

ANNUAL EXPENDITURES	OVERALL LOBBYING LIMIT
\$500,000 or less	20%
\$500,000 to \$1 million	\$100,000 + 15% of excess over \$500,000
\$1 million to \$1.5 million	\$175,000 + 10% of excess over \$1 million
\$1.5 million to \$17 million	\$225,000 + 5% of excess over \$1.5 million
Over \$17 million	\$1,000,000

# What is lobbying under 501(h)?

(definitions for private foundations and public charities / community foundations making the 501(h) election)

## DIRECT

Communication

Legislator

Expresses a view about specific legislation

## GRASSROOTS

Communication

General public

Expresses a view about specific legislation

Call to action



# Specific Legislation

## DIRECT

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**Expresses a view  
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legislation**

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Call to action

H. R. 3244

One Hundred Sixth Congress  
of the  
United States of America

AT THE SECOND SESSION

*Begun and held at the City of Washington on Monday,  
the twenty-fourth day of January, two thousand*

An Act

To combat trafficking in persons, especially into the sex trade, slavery, and involuntary servitude, to reauthorize certain Federal programs to prevent violence against women, and for other purposes.

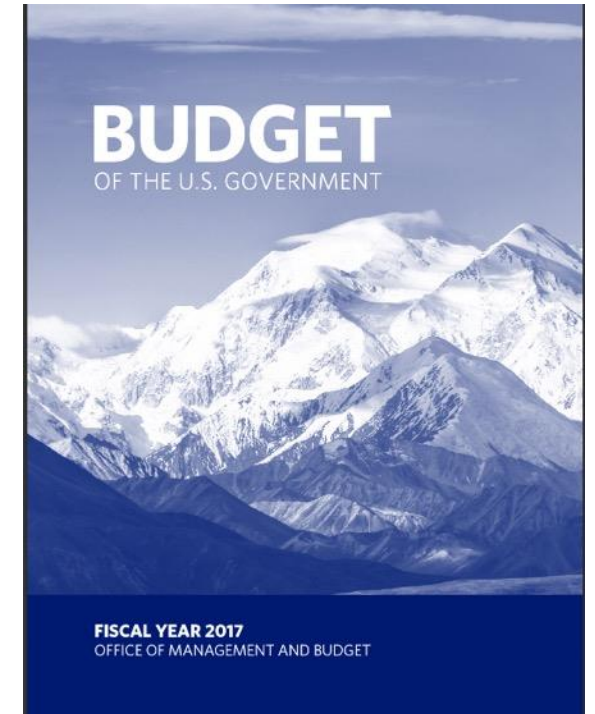
*Be it enacted by the Senate and House of Representatives of  
the United States of America in Congress assembled,*

SECTION 1. SHORT TITLE.

This Act may be cited as the "Victims of Trafficking and  
Violence Protection Act of 2000".



SUPPORTING NOMINATION OF  
NEERA TANDEN AS OMB DIRECTOR



# NOT SPECIFIC LEGISLATION

## Food insecurity in Arkansas

Hunger FACTS. More than 560,000 people in Arkansas are food insecure. Food insecurity refers to **lack of access to enough food to support an active, healthy life**. Food insecurity may or may not be a constant state for any given family, with some people going back and forth between having enough food to eat and not.

[News | Arkansas Hunger Relief Alliance](#)  
[www.arhungeralliance.org/news/](http://www.arhungeralliance.org/news/)

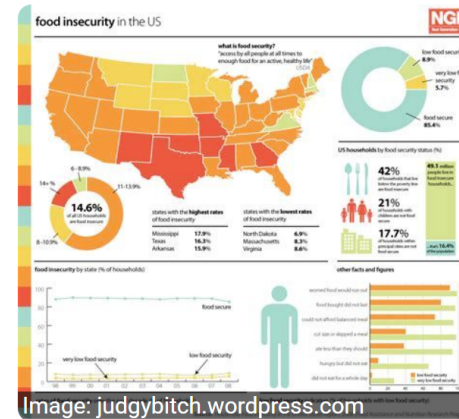


Image: judgybitch.wordpress.com

# SPECIFIC LEGISLATION



COVID-19 RESPONSE ISSUES EVENTS NEWS KIDS COUNT

## Arkansans Need A 15 Percent SNAP Increase

Prior to the beginning of the COVID-19 pandemic, [food insecurity was a problem for over 15 percent of Arkansas households](#), higher than the national average of 11 percent. In fact, during fiscal year 2019, 1 in 9 Arkansans benefited from the Supplemental Nutrition Assistance Program (SNAP). Historical high levels of unemployment, due to the closure of many businesses in the wake of the pandemic has caused that number to increase. The Arkansas Food Bank [reports](#) that since March 2020, the number of food insecure Arkansans has increased to 17 percent, with projections estimating that number could climb to at least 22 percent. These negative outcomes disproportionately impact Black and Latinx communities. According to [recent data](#) found by the U.S. Census Bureau, Black and Latinx Arkansans are far more likely to find themselves without enough food to eat, when compared with the population of White Arkansans.



# NOT Specific Legislation

- Regulations
- Executive orders
- Enforcement of existing laws
- Litigation



August 5, 2020 (updated 5:00 pm)

The Honorable Wilbur L. Ross  
U.S. Department of Commerce  
1401 Constitution Avenue N.W.  
Washington, DC 20230

The Honorable Steven Dillingham  
Census Bureau  
4600 Silver Hill Road  
Suitland, MD 20746

Re: 506 Philanthropic Leaders Say Do Not Cut the 2020 Census Short

Dear Secretary Ross and Director Dillingham:

We write in response to the Census Bureau's announcement that it intends to drastically cut short 2020 Census operations and subsequent, critical data improvement, processing, and review activities. We urge the Census Bureau to maintain its constitutional responsibilities to enumerate every household that has not responded on its own, in order to achieve a fair and accurate count. Given the pandemic, there is every reason to believe the Census Bureau will need to collect data through October 31, a date the Census Bureau itself had earlier announced was needed to meet its obligations.

We are leaders of nonpartisan philanthropic institutions from across the country, large and small, giving hundreds of millions of dollars each year to advance the common good and improve the quality of life in the United States. We have different funding approaches, are ideologically diverse, and do not always share the same priorities. But we have come together to support a fair and accurate 2020 Census, with a focus on historically undercounted communities, including people of color, low-income and immigrant families, and young children. We all oppose cutting short the 2020 Census in the midst of a global pandemic.

Across our varied institutions, we share a belief that reliable and accurate data are a necessary foundation for a well-functioning government, robust civil society, and thriving business sector in the United States. We rely on accurate census data to help identify community needs and prioritize grantmaking, and our grantees and partners rely on accurate census data to advocate for and improve our communities, through their work on various issues, including poverty, health care, criminal justice reform, racial equity, education, homelessness and housing, and infrastructure.

Collectively, many of our institutions have invested more than \$100 million in rural and urban communities across the country in support of the Census Bureau's efforts to educate and persuade households about the importance of participating in the 2020 Census. The census has already faced numerous hurdles this decade, including a pandemic that required operational modifications in order to prioritize the health and safety of the census workforce and the American public. The pandemic has created unprecedented challenges for the Census Bureau to recruit, train, and retain enumerators, and is still preventing in-person contact in many areas.

According to an analysis by the Center for Urban Research at City University of New York's Graduate Center, only four states and 14% of the country's counties have achieved their 2010 level of self-response – and they had nearly three extra months when compared to 2010. With nearly four out of ten households still to be counted, many of us have deepened our engagement and made additional grants to organizations in support of outreach plans that rely on the Bureau's announced October 31 end date for field operations.

Letter from U.S. Philanthropy Leaders  
RE: Completion Date of the 2020 Decennial Census  
August 5, 2020 (updated 5:00 pm)  
Page 28 of 29

Ellen Dorsey  
Executive Director  
Wallace Global Fund  
Washington, DC

Kathleen McLaughlin  
President  
Walmart Foundation  
Bentonville, AR

Jennifer Lockwood-Shabat  
President & CEO  
Washington Area Women's Foundation  
Washington, DC

Jessica Slade  
Executive Leadership Officer  
Webber Family Foundation  
Austin, TX

N. Elizabeth McCaw  
President & CEO  
Washington Women's Foundation  
Seattle, WA

Katherine Louw  
Executive Director  
Watterson Family Foundation  
Bluffton, SC

Fred Ali  
President & CEO  
Weingart Foundation  
Los Angeles, CA

Hanh Le  
Executive Director  
Weissberg Foundation  
Arlington, VA

Ed Kissam  
Co-Trustee  
Werner-Kohnstamm Family Giving Fund  
Oakland, CA

Dr. Anna Wasescha  
President  
West Central Initiative  
Fergus Falls, MN

Mauri Ingram  
President & CEO  
Whatcom Community Foundation  
Bellingham, WA

Larry Kramer  
President  
William & Flora Hewlett Foundation  
Menlo Park, CA

Shawn McCaney  
Executive Director  
William Penn Foundation  
Philadelphia, PA

Patricia A. Maddox  
President and CEO  
Winter Park Health Foundation  
Winter Park, FL

Sherece Y. West-Scantlebury  
President & CEO  
Winthrop Rockefeller Foundation  
Little Rock, AR

Sheri Scavone  
Executive Director  
WNY Women's Foundation  
Buffalo, NY

Donna P. Hall  
President & CEO  
Women Donors Network  
San Francisco, CA

Kelly Nevins  
Executive Director  
Women's Fund of Rhode Island  
Providence, RI

Ann Warner  
CEO  
Women's Rights and Empowerment  
Network  
Columbia, SC



# In unusual move, Pittsburgh Foundation files 'friend of court' brief in gerrymandering case



PITTSBURGH POST-GAZETTE

JAN 15, 2018

8:51 AM



On Wednesday, the state Supreme Court will hear arguments on whether Pennsylvania's politicians have drawn legislative district maps so favorable to themselves that they violate the rights of voters.



And one of Pittsburgh's most prominent philanthropic organizations, the Pittsburgh Foundation, is so concerned about the issue that it's drawn up a new road map for its own activities.



Calling the state's Congressional districts a "draconian infringement of the constitutional rights of Pennsylvania citizens," the foundation filed a "friend of the court" brief urging the justices to craft "a reasoned and fair standard that will eliminate unconstitutional partisan gerrymandering."



# Colorado Health Foundation on Supreme Court Decision on Louisiana Abortion Law

Posted: Jun 29, 2020

By [Colorado Health Foundation](#)

Today's U.S. Supreme Court decision is a win for health and health equity, and for millions of Americans who need access to reproductive



# Colorado Health Foundation Statement on DACA Supreme Court Decision

Posted: Jun 18, 2020

By [Colorado Health Foundation](#)

Today's U.S. Supreme Court decision to keep in place the Deferred Action for Childhood Arrivals program (DACA) is a triumph for immigrants, Colorado communities and for our country. DACA recipients weave immense contributions into the fabric of our communities; they have gone to college, started businesses, bought homes and started families. They are our friends, neighbors, co-workers, teachers, members of our military and so much more. Indeed, thousands are health care professionals, or other essential workers, who have been working on the front lines of the pandemic response in Colorado. Keeping families together, healthy and without fear of deportation is key to making our communities stronger, safer and more prosperous. Today and always, we stand with Dreamers and immigrant and refugee communities here in Colorado and across the nation.

For now, roughly more than 650,000 DACA recipients across the country – including 15,000 recipients in Colorado – can breathe a sigh of relief.

# Calls to Action

## DIRECT

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Expresses a view  
about specific  
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**Call to action**

**ASKING TO CONTACT**  
legislators

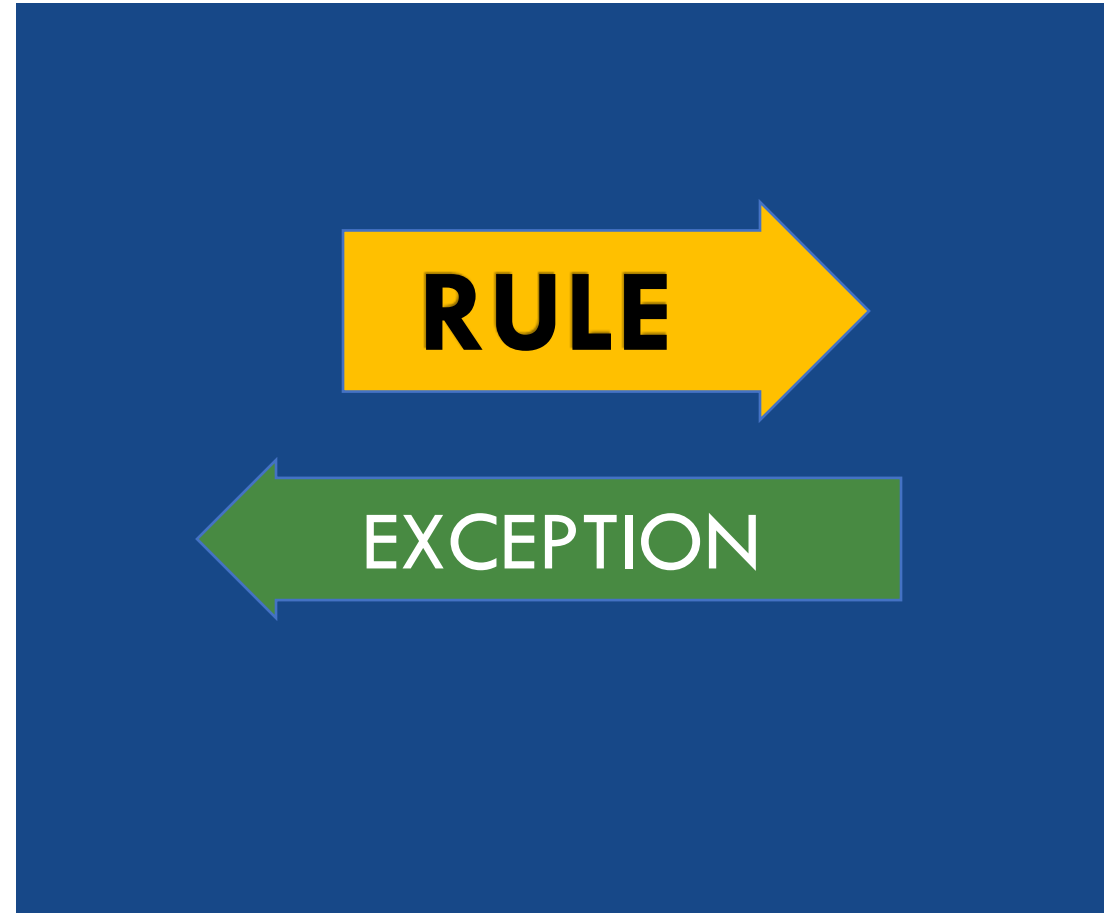
**PROVIDING ADDRESS,**  
telephone number, and/or other  
contact information of legislators

**PROVIDING MECHANISM**  
to enable communication  
with legislators

**IDENTIFYING**  
legislators

# Lobbying Exceptions

- Nonpartisan analysis, study, or research
- Request for technical assistance
- Self-defense
- Examinations and discussions of broad social, economic, and similar problems



# Jointly-funded Projects

- Special exception for private foundations
- It is not lobbying when a private foundation:
  - Makes a grant to an organization conditioned on the receipt of matching support from a governmental body; or
  - Discusses with government officials a jointly funded program or potential program (so long as discussion does not include an attempt to persuade officials on other legislative issues).

# Engaging in Advocacy

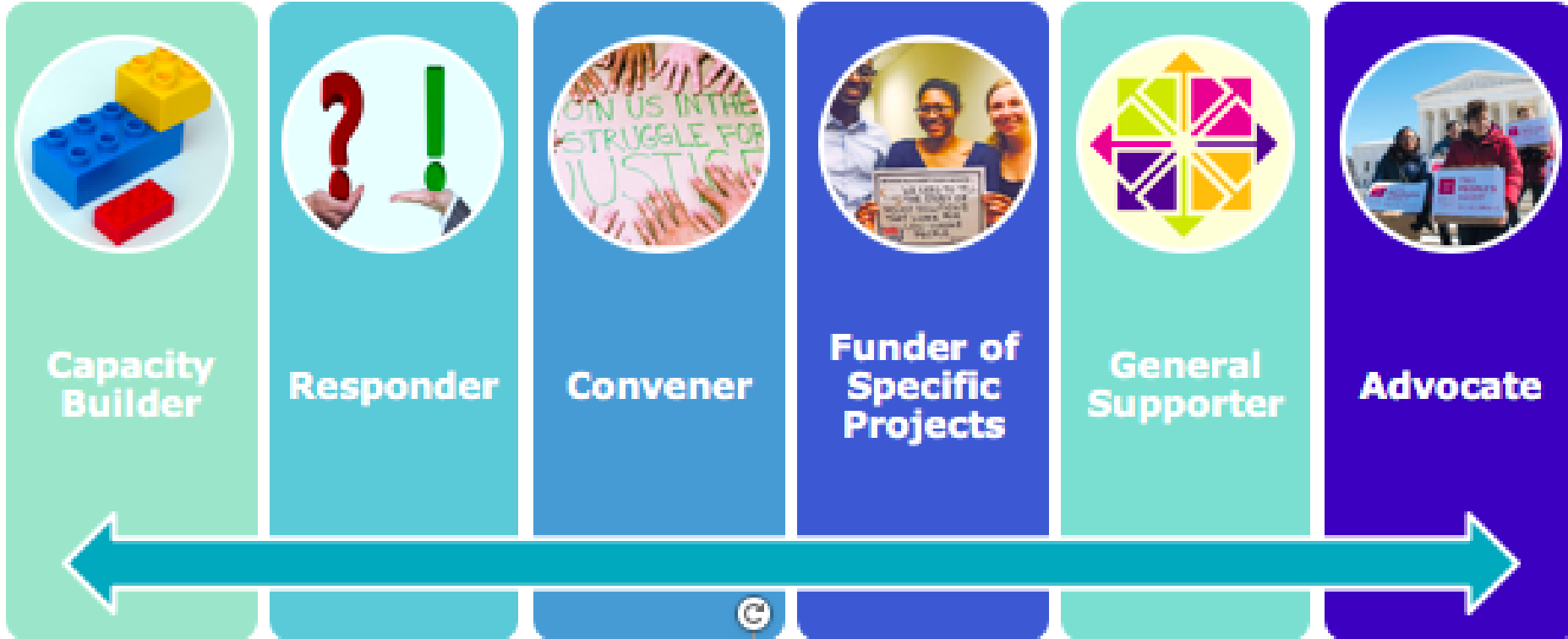
Community foundations **may lobby**, but they must count their lobbying activities against their own organizational lobbying limits.

Private foundations **should not lobby**, but they can engage in other types of advocacy and take advantage of lobbying exceptions.



# Private & Public Foundations May....

- Influence adoption of agency regulations
- Convene nonprofits & decision-makers to discuss broad topics
- Educate legislators about a broad range of issues, without expressing a view on specific legislation
- Meet with legislators to discuss the scope of foundation work
- Take a stand on an executive order
- Train grantees on advocacy rules & how to lobby
- Influence school boards or policies of other, non-legislative, special purpose bodies
- Sign on to an amicus brief or fund litigation to challenge a law



# BUILD Advocacy Capacity



# Private Foundations Engaging in Direct Advocacy Amid Disaster

As health officials around the globe work to contain the spread of the coronavirus, policy makers are responding to the economic crisis left in its wake. It is essential that our elected officials and business leaders seek public input from the communities hardest hit. Now is the time for bold voices and bold solutions.

Many foundations are already [supporting](#) the efforts of their grantees to ensure those communities hardest hit are heard by our leaders. At the same time, many foundations themselves want to weigh in on policy matters. This resource is geared to support and encourage those who want to engage in direct advocacy themselves during this time.

Although private foundations cannot lobby themselves (but, of course their grantees can!), they can engage in many policy activities that do not meet the definition of lobbying. Here are a few tips for those private foundations that want to join sign-on letters, leverage relationships with decision-makers, and speak out publicly on relief efforts that lift up solutions your grantees and their communities have developed.

## Express Public Support for Legislative Solutions

Private foundations may use private (non-government) dollars to express public support or opposition for legislation or legislative solutions.

### Some examples:

A private foundation could post on **Twitter**, **Instagram**, or other social media:

"Restaurant and retail workers, who have lost their jobs need our help. Lawmakers need to halt evictions, late fees & utility shut-offs, and expand the eligibility of those who qualify for unemployment benefits."

Likewise, a private foundation could pen or post a **public blog post** or a **letter to the editor** that said:

"Medicaid reform is missing in the coronavirus relief plan. We urge Congress to raise Medicaid's federal match rate by at least 12 points as sought by a majority of governors, make it easier for people to enroll and stay on Medicaid."

As long as these statements are directed and disseminated to the public (not to lawmakers) and they do not contain a call to action, the IRS does not consider a private foundation to have lobbied.<sup>2</sup>

### Notes

- 1 Unlike private foundations, public foundations CAN lobby themselves and fund a limited amount of lobbying. See [Public Foundations and Advocacy](#).
- 2 The rules may be different for public charities and public foundations depending upon the way they track their lobbying. See [Public Foundations Can Lobby](#) for an explanation of the two ways to track and define lobbying for public foundations and public charities. For an explanation of what activities constitute "lobbying" for private foundations as well as a "call to action" see [Lobbying Defined For Private Foundations](#).



## Communicate with Government Officials

Private foundations may communicate directly with elected and appointed officials in a number of ways that do not constitute lobbying.

### EXPRESS SUPPORT FOR REGULATORY CHANGE

Private foundations are free to express support or opposition for regulatory changes directly with executive branch officials, administrative agencies, boards and commissions—provided they follow a few simple rules. Private foundations should refrain from using government funds to engage in this type of advocacy. If legislative approval is needed for the policy change, then the communication becomes a lobbying communication.

### Example of a permissible tweet:

A private foundation could **tweet** directly to the **Indiana Department of Insurance**.

"Medical providers struggling to provide care to their patients amid coronavirus concerns need IDOI to relax regulatory and reimbursement rules to ease path to safer telehealth options."

### Example of an impermissible tweet:

A private foundation should NOT **tweet** the following as it constitutes "lobbying" for IRS purposes:

"@SenMajLdr McConnell-Hospitals need emergency appropriations for personal protective equipment and ventilators and need Congress to grant @HHS authority to approve Medicaid payments for telehealth visits."

If a written communication expresses a view on both regulatory and legislative solutions and is directed at lawmakers, it is probably considered a lobbying communication.

### EXPRESS SUPPORT OR OPPOSITION FOR EXECUTIVE ORDERS

At every level of government, we are seeing the President, governors, and mayors adopt **executive orders** in an effort to slow the spread of the virus, keep open essential businesses, limit travel, extend elections and change election procedures. Federal tax law permits private foundations to publicly praise or critique these executive orders as well as engage directly with executive officials to craft or amend these orders, provided they do not use federal funds for this type of advocacy. Commenting on or influencing executive orders is not lobbying, presuming no legislative action is needed.

### REQUEST RELIEF FROM GOVERNMENT CONTRACT DELIVERABLES

The pandemic has made it difficult if not impossible for some nonprofits to fulfill their grants under a government contract. Private foundations can contact administrative agencies to seek relief for their grantees to continue receiving payments, provided that the agency has authority to revise contracts without legislative action.

### ENGAGE IN NON-LOBBYING COMMUNICATIONS WITH LAWMAKERS

Private foundations can legally and safely engage in certain communications with lawmakers that might aid efforts toward equitable solutions but do not rise to the IRS' definition of lobbying. The



# Grant Oliphant and Maxwell King: We must face the realities of racism

President Trump's description of other countries was simply and frankly racist. The PG should have said so

GRANT OLIPHANT AND MAXWELL KING

JAN 18, 2018

12:00 AM



*Grant Oliphant is president of The Heinz Endowments. Maxwell King is president & CEO of The Pittsburgh Foundation.*



The Post-Gazette has done our community and the cause of justice a grave disservice with its Jan. 15 lead editorial, "Reason as Racism," published of all days on Martin Luther King Day, when we as a nation commemorate the ongoing fight to end racism in our country.

The editorial, which also appeared in the Toledo Blade, is a silly mix of deflection and distortion that provides cover for racist rhetoric while

## MaineCare: What Everyone Should Know About Maine's Medicaid Program

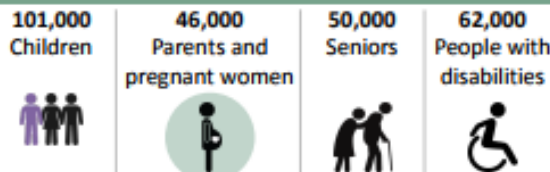
### Keeping Maine healthy in the long run

- MaineCare is the state's largest payment source for long-term services and supports, helping people remain in their homes longer and afford nursing home care when they need it.
- MaineCare is important given Maine's aging population. Seniors account for nearly 1 in 5 MaineCare enrollees, the highest share nationwide and double the U.S. average.

- More than 2 in 3 MaineCare children and adults under 65 live in families with a worker. Illness or disability is the most common reason for not working.

### Who is covered by MaineCare?

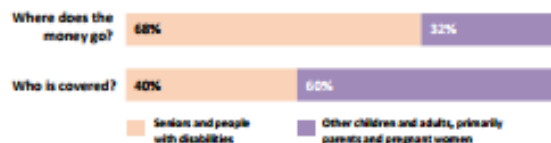
267,000 low-income Maine residents, including:



- MaineCare covers 1 in 3 children and 43% of births in Maine.
- It makes health care affordable and fills gaps in other coverage, including Medicare, for low-income Mainers.

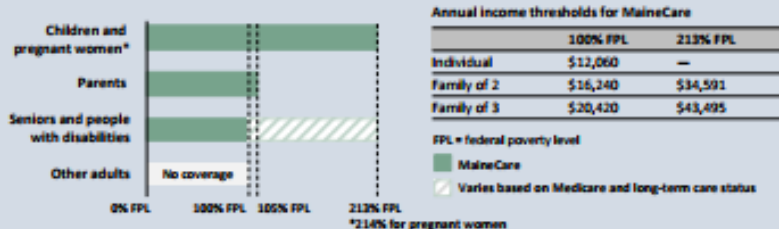
### Spending for people covered by MaineCare

- Most MaineCare spending (68%) supports seniors and people with disabilities, even though most enrollees (60%) are children and parents.



### Eligibility for MaineCare coverage

- For low-income working families, health insurance through an employer may be too expensive or not available at all—particularly among rural Mainers, who are more likely to rely on MaineCare (23%) than others in the state (18%). Not all low-income eligible individuals are eligible for MaineCare.



## MaineCare: What Everyone Should Know About Maine's Medicaid Program

### What does MaineCare cover, and who provides the care?

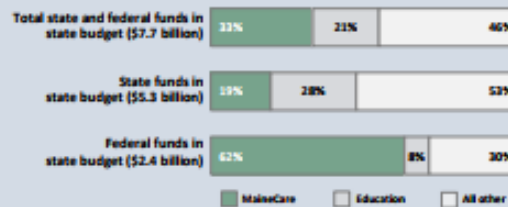
- Covered services include:
  - Care ranging from routine checkups and prescription drugs to hospital stays for serious illnesses.
  - Treatment for those impacted by the opioid epidemic and other public health problems.
  - Mental health treatment and related services for people of all ages, including the 35% of MaineCare children with special health care needs.
  - School-based services, along with screenings and referrals for children to receive needed care.
  - Home health, nursing home, and other long-term services and supports that would otherwise be unaffordable for families.
- People covered by MaineCare receive services from private doctors, hospitals and other health care providers across the state. For example, more than 40,000 MaineCare enrollees visit community health centers each year, which play an important role in ensuring access to primary care.

### What is the role of MaineCare in the state's economy?

- MaineCare is critical to the financial health and stability of hospitals and other health care providers. It ensures access to care throughout the state and keeps jobs in local communities, especially rural areas. Health care is the largest source of employment in Maine, with wages that are 17% above the state average.
- MaineCare provides economic benefits by generating employment, income, and tax revenues.

- MaineCare is jointly financed by the federal government and the state. For each \$100 spent on MaineCare, the federal government pays \$64 and Maine pays \$36.

- MaineCare was 33% of the state's total budget of \$7.7 billion in 2015, including both state and federal funds.
- The program accounted for 19% of state funds in the state budget, and 62% of federal funds.



- If MaineCare were expanded to additional adults, the federal government would pay up to 90% of the cost.

# Foundations speak out on DACA

Posted by Abby Levine on September 20, 2017 at 9:43 am

In the wake of President Trump's decision to rescind DACA (Deferred Action for Childhood Arrivals), many foundations (including many of AFJ's funders) have been condemning the decision. Their willingness to speak out, and in many instances, urge the Administration to reverse course or Congress to act to protect the Dreamers, is advocacy in action!

Not only is this bold advocacy— by both private and community foundations—legal, it illustrates how advocacy is a necessary tool to accomplish their missions. As these foundations recognized, criticizing a decision by an executive branch official does not constitute lobbying under federal tax law. And, publicly expressing a view about what you want to happen next—even if you say Congress must pass a law—is also not likely to be lobbying. For more details about your foundation can do, read [Private Foundations May Advocate](#) and [Public Foundations and Advocacy](#). Still have questions? Call our technical assistance hotline at 866-NP-LOBBY!

Read the statements by bold foundations here:

[Annie E. Casey Foundation](#)

[Blue Shield of California](#)

[California Community Foundation](#)

[The California Endowment](#)

[California philanthropic leaders issued a joint statement](#)

[The California Wellness Foundation](#)

[Caring for Colorado](#)

[East Bay Community Foundation](#)

[Ford Foundation](#)

[Heising-Simons Foundation](#)

[Mary Reynolds Babcock Foundation](#)

[Ms. Foundation for Women](#)

[Raikes Foundation](#)

[San Francisco Foundation](#)

[Sierra Health Foundation](#)

[Weingart Foundation](#)

[W.K. Kellogg Foundation](#)

Yesterday, Mayor Sylvester Turner announced the City of Houston plans to relocate two statues located in two City of Houston parks.

The statues will be removed by Friday, June 19, in commemoration of the Juneteenth Emancipation Proclamation granted their freedom.

In August 2017, Mayor Sylvester Turner appointed a task force of historians, community members, and other experts to review items related to the confederacy and recommend appropriate action.

The task force recommended that the statues be removed from Houston public property and not be destroyed. ([final report](#) and [final appendix](#))

After the task force submitted its findings, the City began working on a plan with partner organizations and funders to identify new locations to place the statues permanently.

The two relevant statues in local public parks will be relocated, at no public expense, to separate sites that provide greater historical context for public viewing.

The Houston Endowment has provided a grant to transfer the Spirit of The Confederacy in Sam Houston Park downtown to be displayed at the Houston Museum of African American Culture in the Museum District.

Mayor Turner Announces Plans to Relocate  
Two Confederate Statues  
New Locations Will Provide Better Context, Prevent Vandalism

RESOURCES  
FEATURES  
NEWS  
REPORTS

The Houston Endowment has provided a grant to transfer the Spirit of The Confederacy in Sam Houston Park downtown to be displayed at the Houston Museum of African American Culture in the Museum District.



## WE SUPPORT AN EMERGENCY CHARITY STIMULUS BILL TO MANDATE INCREASED PAYOUTS FOR PRIVATE FOUNDATIONS AND DONOR-ADVISED FUNDS

Dear Speaker Pelosi, Chairman Neal, Ranking Member Brady, Minority Leader Schumer, Chairman Grassley, and Ranking Member Wyden,

We are writing as philanthropic donors and leaders to urge you to consider including “emergency charitable stimulus” legislation in the next coronavirus relief package by doubling the mandated annual foundation payout over the next three years, from five percent to ten percent, and to mandate the same ten percent payout requirement for Donor Advised Funds (DAFs). This simple change will allow Congress to [inject more than \\$200 billion](#) into the economy over the next three years, according to estimates by the Institute for Policy Studies – all without spending a dollar of taxpayer money.

As you know, private foundations are currently mandated by federal law to spend five percent of their assets each year in grants and overhead, and [DAFs are not required to spend a dime](#). While some

**SIGN OUR LETTER:**

**IT'S TIME TO GET CHARITABLE WEALTH OFF THE SIDELINES!**

**Please sign below if you are a donor, foundation leader or have a donor advised fund. If not, please sign on [HERE](#).**

News | San Antonio

# THOUSANDS OF SAN ANTONIO FAMILIES TO HAVE CASH IN HAND

By Staff Writer | May 2020 | 4 min read

**SAN ANTONIO (May 4, 2020)** — In response to the COVID-19 pandemic, the Family Independence Initiative (FII), a national organization focused on alleviating poverty, has partnered with the H. E. Butt Foundation, City of San Antonio (COSA), Google.org and other donors to provide cash transfers to local families struggling financially because of the crisis.

It's a part of #GiveTogetherNow, a rapid-relief fund FII created with Stand Together to get money to families most impacted by COVID-19. Around \$5.5 million in local and national dollars has been committed to FII efforts to help mitigate poverty in Bexar County/San Antonio. Just over \$2.9 million will go to #GiveTogetherNow, which has already distributed \$500 cash transfers to close to 1000 local families.

## It's Time for an Emergency Charity Stimulus

HOME / NEWS / IT'S TIME FOR AN EMERGENCY CHARITY STIMULUS

### IT'S TIME FOR AN EMERGENCY CHARITY STIMULUS

By *Tina Kroll-Guerch* Posted May 12, 2020 In *News*



Lawmakers are considering an “[emergency charity stimulus](#)” in order to unlock an additional \$200 billion in charitable resources over the next three years. The temporary legislation would mandate that foundations double their payout from 5% to 10% and that DAFs have a 10% payout, as well.

As *Inside Philanthropy* has reported, foundations are digging deep right now and voluntarily increasing their payout. The Libra Foundation and the Wallace Global Fund have recently announced boosts in their payouts.

[Read more in \*Inside Philanthropy\*.](#)

The mission of the Wallace Global Fund is to promote an informed and engaged citizenry, to fight injustice, and to protect the diversity of nature and the natural systems upon which all life depends.

## WGF STATEMENT ON VIOLENCE AND SYSTEMIC RACISM WITHIN CRIMINAL LEGAL SYSTEM

By *Tina Kroll-Guerch* Posted *May 29, 2020* In *News*



**Wallace Global Fund stands against all forms of oppression and injustice. We condemn racism and white supremacy and recognize their long legacy in this country – including within our electoral and criminal legal systems, where structural inequities continue to disproportionately impact Black Americans. We support movements for justice and equality and join our partners and grantees in calling for accountability, reckoning, and structural and systemic change.**

Friday, 29 May 2020 | Media contact: [kmotes@wgf.org](mailto:kmotes@wgf.org)

Black Lives Matter, Criminal Justice, Criminal Legal System, Police Brutality, Racism, White Supremacy

# Report shows hyper-local investment essential for community survival through crisis

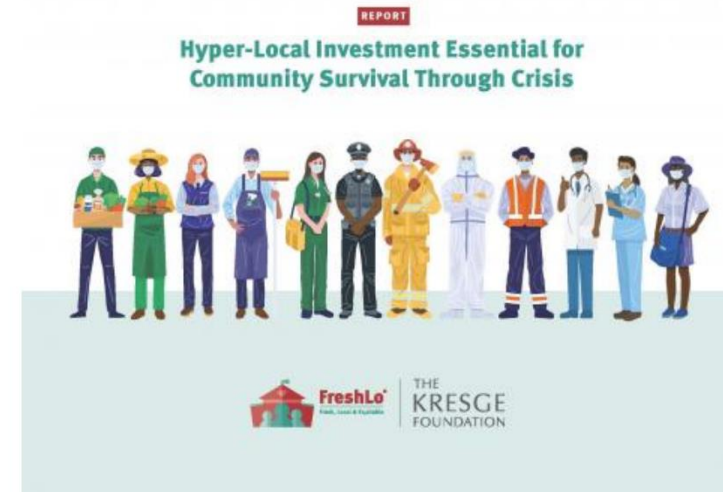
June 25, 2020

HEALTH | ARTS & CULTURE

A new report from The Kresge Foundation's Fresh, Local and Equitable (FreshLo) Initiative affirms the importance of place-based, hyper-local investment in ensuring communities historically left out of power are able to weather crises like COVID-19 and are well-resourced for the long haul.

The FreshLo Initiative seeks to improve access to healthy food, ignite entrepreneurship, spur economic development and integrate arts, culture and community-engaged design to spark neighborhood revitalization in cities around the country. This work has become all the more important amid COVID-19.

While the federal government has fallen short, neighborhood cultural



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**booth..”**

Mark me down as being in the Killer Mike camp. Here at TCE, our Board of Directors has recently approved a 10-year strategic framework – built from our decade-long Building Healthy Communities experience with grantee-partners – that is centered upon “people power:” investing in the ability and capacity of grassroots- and advocacy organizations to strategize-organize-mobilize for a healthier, more equitable California, and through a racial justice lens.

The passion and energy of outrage in social justice is critical. But we must invest to plan, strategize, organize, mobilize – and vote. @KillerMike call me. Let’s talk about the Plan.



**Robert K. Ross, MD**

President & CEO, The California Endowment

## Banning Investments in Firearms Companies

As a [first step](#), based on our studies of the issue and our mission, we have decided to:

- Add a prohibition on investments in firearm manufacturers to our investments policy. This represents the third such "negative screen" in that policy, with tobacco products and private, for-profit prisons being the other two. It's a modest and constrained action for sure, but most of our board members felt that America is a nation with far too much weaponry in our communities and on our streets, and we just didn't want to aid and abet that problem. The matter of a firearms-manufacturing prohibition has come up in years past, but the Parkland shootings and the activism they have spurred pushed us to act on this occasion.
- Reject any policy or practice approach that militarizes schools and campuses and view the presence of armed teachers or other personnel as an unacceptable answer to the problem of school shootings.

The activism after Parkland was our second key area of deliberation. The activism of high-school students and youth allies — in Florida and across the nation — that spontaneously erupted in the days following the shootings was an inspiration.

At our foundation, investments in helping young people become activists and engaged citizens on health and wellness issues have paid off in ways we didn't even imagine at first.

Young people have hit home runs time after time when we have provided support to help them advocate and organize for improvements in immigrant health care and changes to the juvenile-justice and criminal-justice systems. They also played a huge role in pushing the idea that everyone in America deserves health insurance.

## After Parkland, How Foundations Can Act

By Robert Ross





1. Physical Health (Must provide direct clinical services, caregiver support, or health system navigation through the Get Covered TN initiative to apply under physical health)
2. Mental Health
3. Recovery from Alcohol or Drug Addiction
4. Healing from Abuse, Neglect, or Violence

Applicants must also have their own statement of inclusiveness or non-discrimination. Please review [The Trust's Statement of Inclusiveness](#) prior to making application to ensure that the potential applicant organization and its programs are consistent with inclusion.

### × Advocacy Grant

Advocacy means problem-solving. These grants are for nonprofits that want to solve policy or program issues that will help Middle Tennesseans get healthier. We give them to nonprofits that focus on either increasing access to health services or preventing childhood trauma. We fund two types of Advocacy Grants:

1. **Multi-year Advocacy Grants provide unrestricted funds** for nonprofits with a well-developed advocacy plan. Recipients of these funds are committed to advocacy and to solving problems that affect many people because of a broken system. These can grants are \$100,000 or less per year.
2. **Capacity-Building Grants** provide funds for nonprofits to improve their agencies before beginning advocacy work. These funds can be used for strategic planning and will prepare an agency to apply for a future multi-year grant. These grants are \$15,000 or less.

**Advocacy Grant** applicants are required to attend an Advocacy Workshop before applying.





## HC50 Press Release

March 14, 2017



The Mary Black Foundation and its partners have organized a *Walk with Your Elected Official* event on March 25, 2017 at 10:00 am. Click [here](#) to find out how you can participate.

**Mary Black Foundation**  
864-573-9500  
349 East Main Street, Ste. 100  
Spartanburg, SC 29302  
[www.maryblackfoundation.org](http://www.maryblackfoundation.org)

# Funding Advocacy

Make Lobbying Grants  
public or community  
foundations can fund  
lobbying directly

General Support Grants  
funding grantees that  
advocate  
through general support

Specific Project Grants  
funding non-lobbying  
portions of advocacy  
projects

“A grant... is **earmarked** if the grant is given pursuant to an agreement, **oral or written**, that the grant will be used for specific purposes.”

A public charity or a community foundation may  **earmark**  a grant for lobbying, but it must count the grant against its own  **lobbying limit** .

Private foundations should not **earmark** grants for lobbying, but private foundations may fund grantees that **lobby**.

\$\$\$

General  
Support  
Grants

Specific  
Project  
Grants

If a grant is not earmarked for lobbying or any other specific project, the foundation is not responsible for grantee lobbying.

If a foundation grant is less than or equal to a project's non-lobbying component, the grant is not a lobbying expenditure.

# SPECIFIC PROJECT Grant Safe Harbor

Project Budget

Lobbying = \$40,000  
Non-Lobbying = \$60,000

\$50,000 grant from Foundation 1

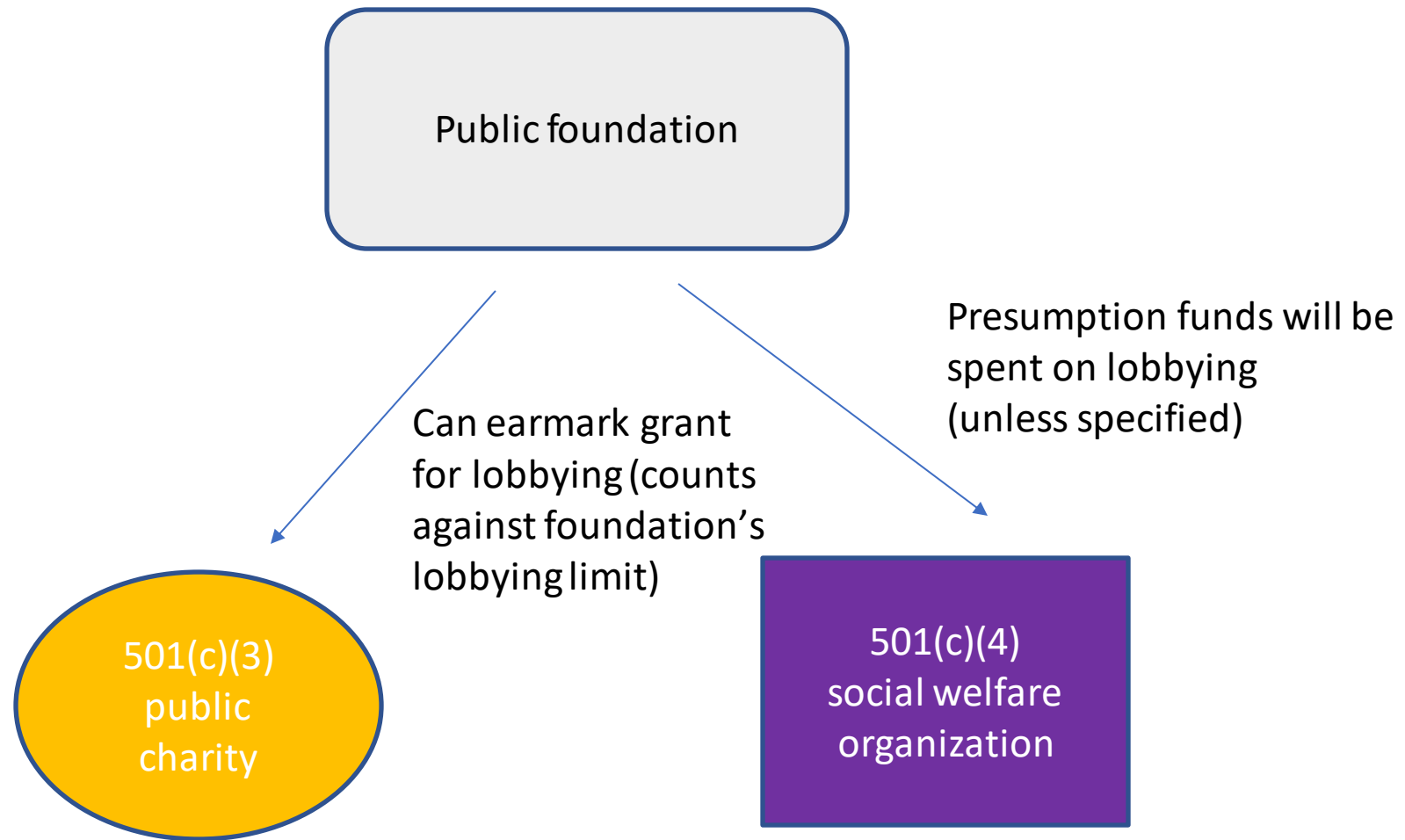
\$50,000 < \$60,000  
No taxable/lobbying expenditure

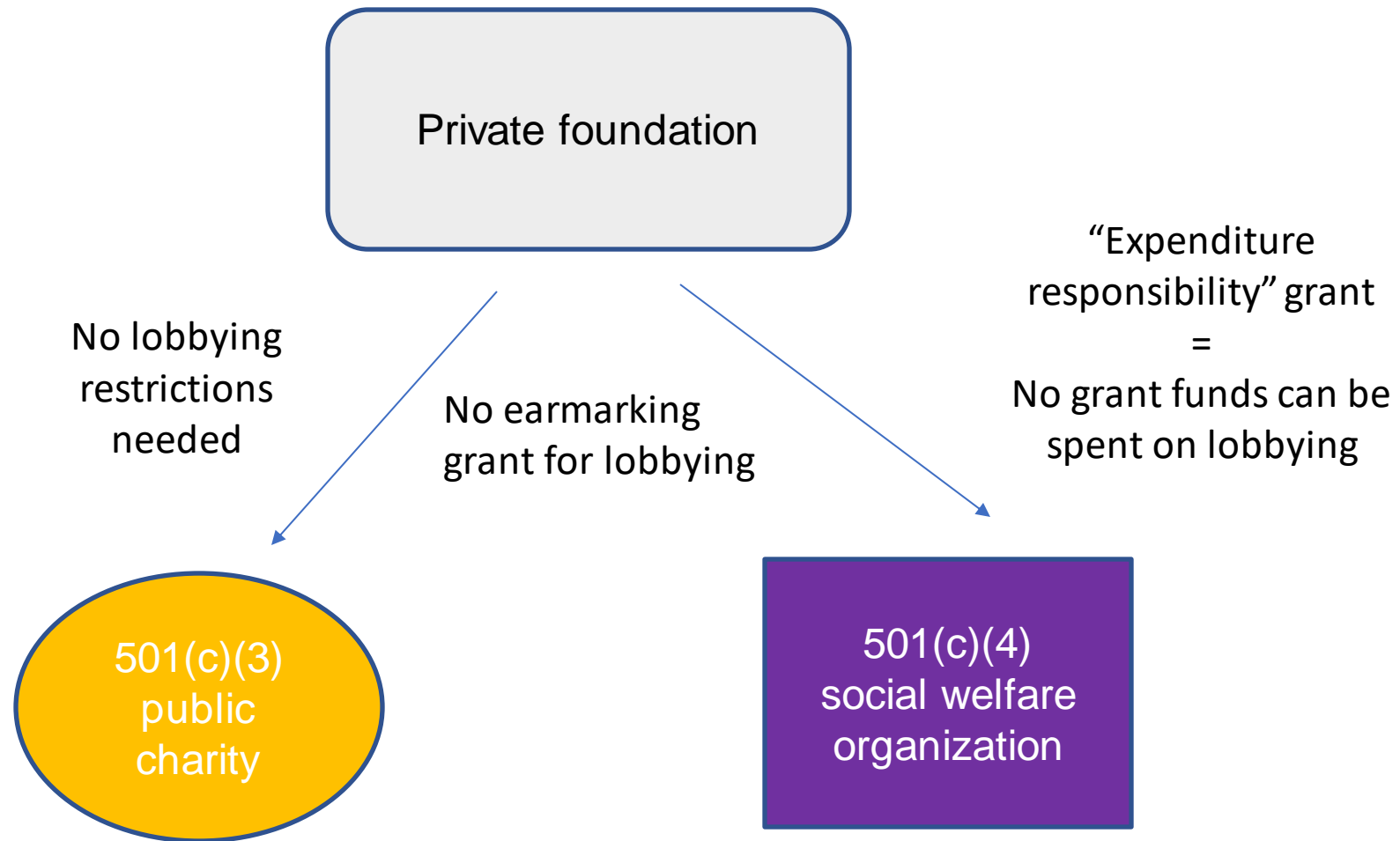
\$50,000 grant from Foundation 2

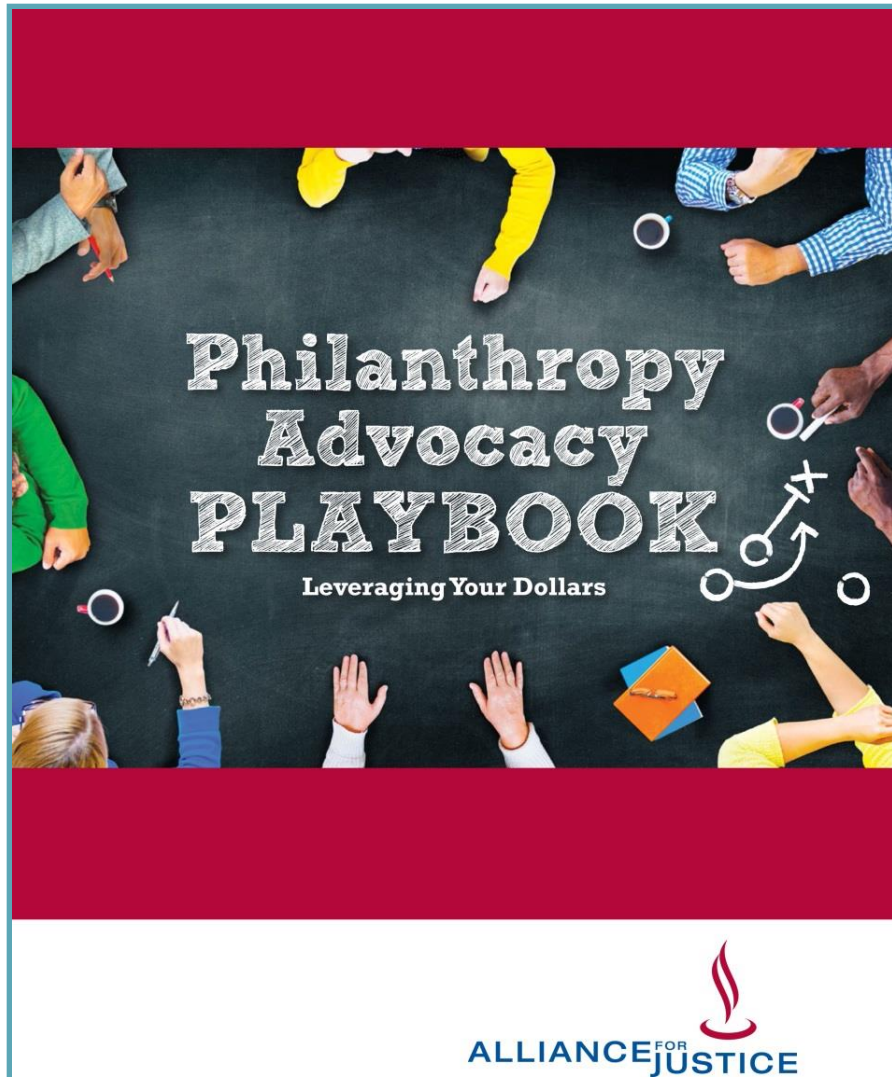
\$50,000 < \$60,000  
No taxable/lobbying expenditure

- Restricting public charity grantees from lobbying is **not necessary**.
- Grant terms that say a grant is “**not earmarked for lobbying**” are not the same as terms that say lobbying is prohibited.
- Lobbying restrictions are only necessary when private foundations make grants to non-501 (c) (3) organizations.





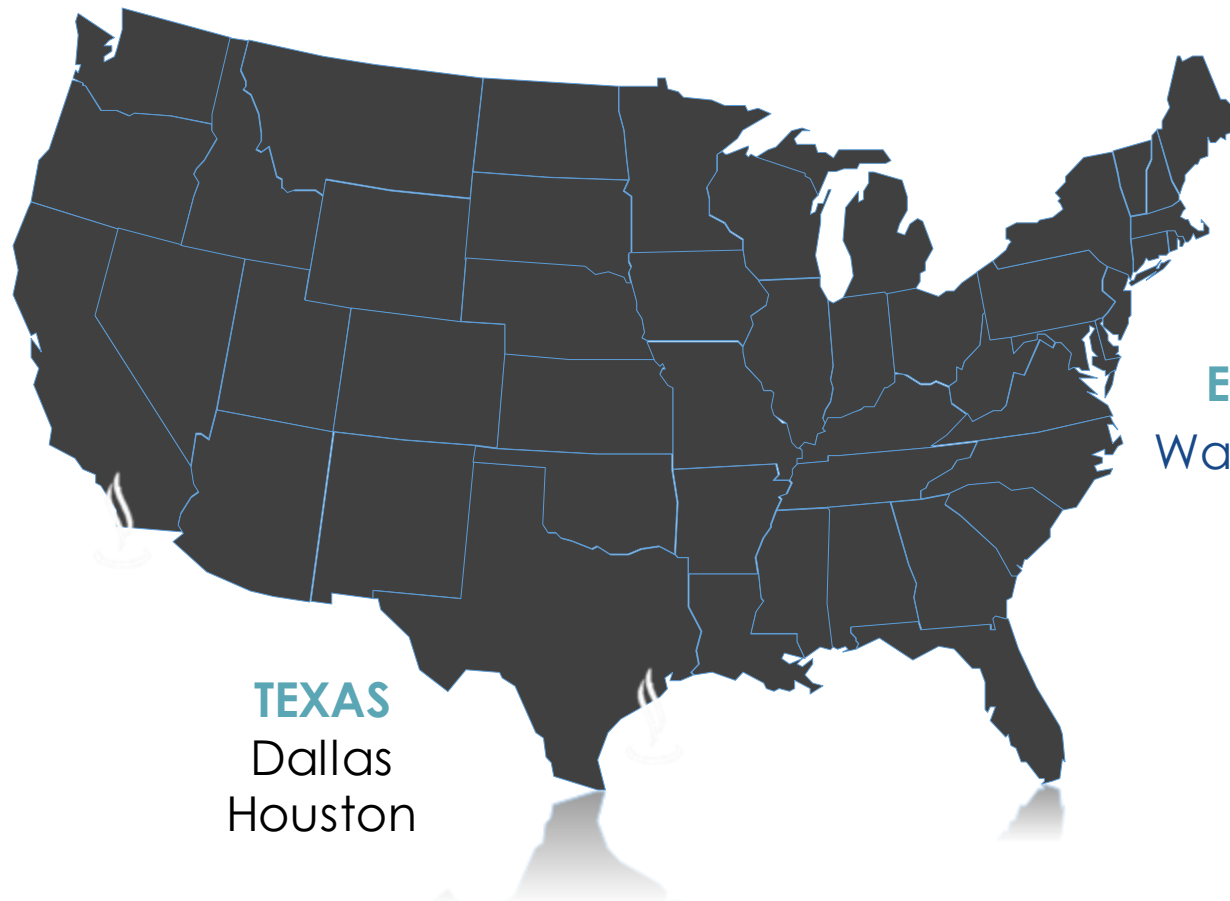




# Take aways....

<b>FUNDERS</b>	<b>GRANTEES</b>
Educate about and encourage grantees to make the 501 (h) election	Consider making the 501 (h) election
Review your grant agreements	Talk with your board about advocacy
Talk with your trustees about importance of advocacy	Join coalitions—you don't have to do this by yourself
Participate in funder collaboratives	Don't be afraid to talk with funders about advocacy

**WEST COAST**  
San Francisco  
Los Angeles



**EAST COAST**  
Washington, DC

**TEXAS**  
Dallas  
Houston

866-675-6229

advocacy@afj.org

bolderadvocacy.org | alevine@afj.org

@AFJBeBold | @AlevineAFJ



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