



Lobbying rule highlights

- As a 501c3, **YOU CAN LOBBY** but not “substantially.”
- Adhere to the definitions, reporting requirements & any funder/contractual limitations.
- Take the “h” election on your 990 to be subject to expenditure limitations.
- The IRS defines two types of lobbying:
 - *Direct Lobbying*: direct communication with legislators, their staff or other gov’t. officials asking them to take a position on specific legislation
 - *Grassroots Lobbying*: communication with the public that includes **a call to action** on a specific legislative act
- NYS Commission on Ethics & Lobbying defines lobbying more broadly as “an attempt to influence government decision-making” (legislation, executive orders, regulations, & procurements).
- NYS does not restrict amount of lobbying but requires reporting if you spend more than \$5K annually.
- *See handout from Vince Marrone, Public Strategies, LLC, for more details.*



Relationship-building highlights

- Building trust is critical
 - Take the time needed to build the relationship.
 - Don't discount staffers.
 - Involve board members, constituents, donors, influencers, etc.
- Know your audience & what you are looking for
 - Do background research and align your interests & priorities as best as you can.
- Cultivate like you would a donor but be aware of the political sensitives & boundaries
 - Keep them informed & updated on an ongoing basis.
 - Invite them to attend your events, visit your program or facility, etc. and be persistent.
- Go where they go
 - Follow their social media to learn what community events they will be attending and make it a point to make contact.
 - *Be aware* - your nonprofit cannot be associated with or pay for events that are partisan political activities, such as a fundraiser. However, an individual associated with your organization can do so on their own.



Storytelling & facts highlights

- Stories about real people and situations in the official's district or community can make issues and the impact of decisions and change real and impactful.
- Stories infused or supported by facts and data are even more powerful.
- Be prepared to support your stories and request with easy-to-explain information.
- Be straight about the information and know the views of others, including those that may oppose your position or request.
 - Note - that the official or staff will likely go to or hear from others (both within the community or gov't.) to cross-check or get more info on the matter.