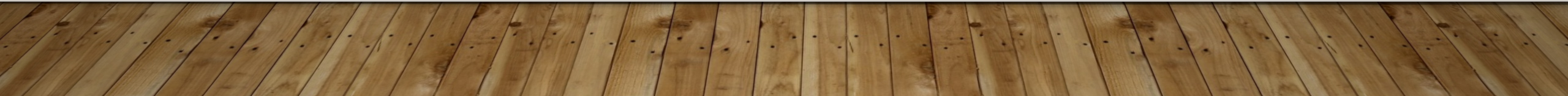


FEARLESS LOBBYING AND ADVOCACY

A LESSON TO ENCOURAGE ACTIVE PARTICIPATION IN
LEGISLATIVE DISCOURSE

HOUSING ACTION ILLINOIS –OCTOBER 2016



2 WHAT DO YOU KNOW? WHAT HAVE YOU HEARD?

- LOBBYING, POLITICAL ACTIVITY, ADVOCACY and THE IRS
- HALLOWEEN, ELECTIONS and THE STATE BUDGET
OH MY!

3 POLITICAL ACTIVITY

- DO NOT ENGAGE IN POLITICAL CAMPAIGN ACTIVITY
- DO ENGAGE IN NONPARTISAN POLITICAL ACTIVITY
- FIRST AMENDMENT RIGHTS ARE SECURE

4 WHAT IS LOBBYING?

- LOBBYING IS
 - DIRECT LOBBYING or
 - GRASSROOTS LOBBYING

5 DIRECT LOBBYING

- A COMMUNICATION OR ACTIVITY,
- DIRECTED AT A LEGISLATOR, THEIR STAFF OR OTHER GOVERNMENTAL EMPLOYEE WHO PARTICIPATES IN FORMULATION OF LEGISLATION,
- REFERS TO AND
- EXPRESSES VIEW ON SPECIFIC LEGISLATION

6 GRASSROOTS LOBBYING

- A COMMUNICATION OR ACTIVITY,
- DIRECTED TO THE GENERAL PUBLIC,
- REFERS TO AND
- EXPRESSES VIEW ON SPECIFIC
LEGISLATION AND
- INCLUDES A CALL TO ACTION



7 THIS IS NOT LOBBYING

- PROVIDING TECHNICAL ADVICE TO LEGISLATIVE BODY OR COMMITTEE IN RESPONSE TO A REQUEST
- MAKING NONPARTISAN ANALYSIS, STUDY OR RESEARCH AVAILABLE
- EXAMINATIONS OR DISCUSSIONS OF BROAD SOCIAL OR ECONOMIC PROBLEMS
- SELF DEFENSE EXCEPTION
- UPDATING MEMBERS ON STATUS OF LEGISLATION WITHOUT A CALL TO ACTION

8 LOBBYING TESTS

- SUBSTANTIAL TEST



- EXPENDITURE TEST - CLEAR AND FEARLESS

9 SUBSTANTIAL TEST

- NO SUBSTANTIAL PART OF ACTIVITIES MAY BE LOBBYING
- HOW MUCH IS SUBSTANTIAL?
- WHAT COUNTS? WHO KNOWS?
- IT IS VAGUE AND FRIGHTFUL



10 EXPENDITURE TEST

- TIRED OF COMPLAINTS, CONGRESS PASSES SECTION 501(h)
- NOT APPLICABLE TO CHURCHES OR PRIVATE FOUNDATIONS
- CLEAR GUIDELINES
- FEARLESS LOBBYING



II YOU CAN SPEND MORE THAN YOU THINK

If the amount of exempt purpose expenditures is:	Lobbying nontaxable amount is:
≤ \$500,000	20% of the exempt purpose expenditures
>\$500,000 but ≤ \$1,000,000	\$100,000 plus 15% of the excess of exempt purpose expenditures over \$500,000
> \$1,000,000 but ≤ \$1,500,000	\$175,000 plus 10% of the excess of exempt purpose expenditures over \$1,000,000
>\$1,500,000 but ≤ \$17,000,000	\$225,000 plus 5% of the exempt purpose expenditures over \$1,500,000
>\$17,000,000	\$1,000,000

12 APPLICATION OF LOBBYING TESTS

- DO ONLY GOOD, NFP SPENDS \$500,000/YEAR TO MAKING SURE SERVICE DOGS ARE AVAILABLE FOR PEOPLE IN NEED. THERE IS LEGISLATION PENDING TO CLOSE ALL SERVICE DOG TRAINING PROGRAMS AND D.O.G, NFP ASKS VOLUNTEERS TO MAKE PHONE CALLS TO LEGISLATORS TO VOTE NO ON THE LEGISLATION AND ASKS CONSTITUENTS TO CONTACT THEIR LEGISLATORS. D.O.G. STAFF CREATE TALKING POINTS, POSTERS, COMPILE LISTS OF PEOPLE TO CALL AND HIRE A BUS TO TAKE PEOPLE TO LEGISLATURE. THE EMPLOYEE TIME AND COST IS 5% OF ANNUAL BUDGET.

13 REGISTRATION AS A LOBBYIST FEDERAL, STATE AND LOCAL LAWS

- FEDERAL LOBBYIST REGISTRATION ACT
- ILLINOIS HAS LOBBYIST REGISTRATION ACT
- CHECK WITH COUNTY AND CITY TO SEE IF THERE ARE LOBBYING REGISTRATION REQUIREMENTS

14 JUST DO IT

- LOBBY WISELY AND FEARLESSLY
- PAY ATTENTION TO
 - EXPENDITURES
 - FUNDING CONTRACTS
 - REGISTERING AS A LOBBYIST

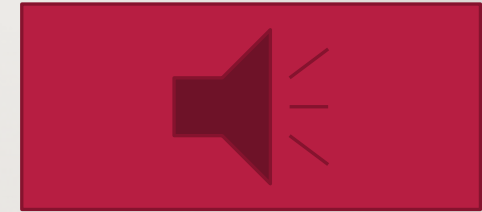


15 ADVOCACY

- MAKE YOUR VOICE HEARD!

HELP POLICYMAKERS FIND SOLUTIONS!

- EDUCATE LEGISLATORS ABOUT THE EFFECT OF A POLICY
- EMAIL, CALL OR VISIT LEGISLATORS TO DISCUSS ISSUES AFFECTING CONSTITUENTS OR ORGANIZATION



16 FEARFUL, FEARLESS AND WISE

- DO NOT SUPPORT OR OPPOSE CANDIDATES FOR PUBLIC OFFICE
- DO ENGAGE IN NONPARTISAN POLITICAL ACTIVITY
- DO LOBBY ON BEHALF OF YOUR ORGANIZATION AND ITS CONSTITUENTS
- UNDERSTAND THE LOBBYING TESTS AND MAKE THE WISE CHOICE
- ADVOCATE!

17 RESOURCES

- ALLIANCE FOR JUSTICE- www.afj.org
- BOLDER ADVOCACY - <http://www.bolderadvocacy.org/>
- Internal Revenue Service

<https://www.irs.gov/pub/irs-pdf/p422lpc.pdf> pages 5-7

https://www.irs.gov/irb/2007-25_IRB/ar09.html Revenue Ruling 2007-

18 THE LAW PROJECT OF THE CHICAGO LAWYERS' COMMITTEE FOR CIVIL RIGHTS UNDER LAW

- JODY ADLER 312 202 3647
- JADLER@THELAWPROJECT.ORG
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