

PILLAR
nonprofit network



**#PolicyTalk 4: Yes,
Nonprofits Can do Advocacy,
Actually; Let's Get Started**

**A quick guide to the rules, risks, and rewards
of nonprofit advocacy.**

Introductions (us when we were 12)

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Housekeeping

- ▷ Restrooms
- ▷ Food & Water
- ▷ Breakouts
- ▷ Lighting & Sound
- ▷ Icebreaker



Acknowledging place, purpose,
stewardship, and governance

Learning agreements

- ▷ Address the issue not the person
- ▷ Lean into discomfort (your own)
- ▷ Be respectful of others – on their terms
- ▷ Expect and accept non-closure
- ▷ Acknowledge we are growing
- ▷ Show up with humility and empathy even if opinions differ
- ▷ Be patient and accountable to one another to build trust.

Learning agreements

- ▷ Confidentiality: What's said here stays here, what's learned here leaves here
- ▷ We will work with you to resolve disputes
- ▷ We would like to encourage you to take this opportunity to think more deeply about Ethical and Safe Spaces at your organization or community.

**#PolicyTalk recap:
How can social purpose organizations
work together to help shape the City's
multi-year budget?**

**(And keep working together to advance our
missions and serve our communities better.)**

An Advocates' "Agenda." (Two, even.)

- ▷ Yes, you may! (Really, really, really.)
 - You always could, so why is this even a question?
 - So what EXACTLY may we do?
- ▷ You probably should.
 - The moral and democratic imperative
 - The risks of *not* doing advocacy work. (Breakout)
 - So who/what should I advocate for?
- ▷ How to get started and keep going.
 - Build public policy into your organization (e.g., strat plan; job roles; org structure; policy strategy; entry-level advocacy)
- ▷ Your network, your thoughts. (A one-pager.)

Yes, you *may* do advocacy!

▷ Why is this even a question?

- “Advocacy chill” of extant regulations *and* their targeted application
- Consultation Panel on the Political Activities of Charities, appointed by the Minister of National Revenue in September 2016, “to clarify and broaden the ability of registered charities to engage in political activities in support of their charitable purposes, while maintaining an absolute prohibition on partisan political activities.”

Yes, you *may* do advocacy!

▷ Recommendations of the Panel (Admin)

- Revise the CRA's administrative position to enable charities to fully engage in public policy dialogue and development.
- Implement changes to the CRA's administration of the ITA in the following areas: compliance and appeals, audits, and communication and collaboration to enhance clarity and consistency.

Yes, you *may* do advocacy!

▷ Recommendations (Legislative)

- Delete “non-partisan ‘political activities’” in the ITA to explicitly allow charities to fully engage in non-partisan public policy dialogue and development, provided it is subordinate to and furthers their charitable purposes.
- Modernize the legislative framework governing charities (ITA) to ensure a focus on charitable purposes rather than activities, and adopt an inclusive list of acceptable charitable purposes to reflect current social and environmental issues and approaches.

Yes, you *may* do advocacy!

▷ And so . . .

- 2018: from 10% “Political activities” for *charities* > 100% Public Policy Dialogue and Development Activities (PPDDA or P2D2A)

▷ But . . .

- Ongoing effects of “advocacy chill” on *whole sector*; (nonprofits move slowly, too)
 - 0% investment, underdeveloped “muscle” (or capacity)
 - Lack of models, leaders
 - More on this soon

For the CRA, P2D2As include:

- ▷ **Providing information to supporters or the general public** related to charitable purposes, including public awareness campaigns.
- ▷ **Conducting research into public policy**, distributing and discussing research and findings with the media and with others as they see fit.
- ▷ **Expressing and disseminating opinions** on matters related to charitable purposes when joining in public policy development.
- ▷ **Advocating to retain, oppose, or change a law, policy, or decision**, of any level of government in Canada, or a foreign country.
- ▷ **Mobilizing supporters or the public to contact elected officials**, public officials, political parties, and candidates to do the same.
- ▷ **Providing forums and convening discussions** with competing candidates and political representatives to speak at the same event.
- ▷ **Communicating on social media** to express views, and offer opportunities for others to express views in regard to public policy.

Examples of PPDDAs that further stated charitable purposes. All totes OK!

- ▷ **A charity provides information to the public about the benefits of enhancing social assistance programs** for the impoverished, to further its purpose of relieving poverty.
- ▷ **A charity makes representations to elected representatives to lobby for increased provincial funding for post-secondary education**, to further its purpose of advancing education.
- ▷ **A charity calls on supporters to contact elected representatives of all parties go urge support for provincial funding for religious schools of a certain faith through the public education system**, to further its purpose of advancing religion.
- ▷ **A charity expresses views on social media platforms against a municipal government's zoning decision to permit smoking on restaurant patios**, to further its purpose of promoting health.
- ▷ **A charity advocates for higher government rebates for electric vehicle purchases**, to further its purpose of protecting the environment.

Charitable Purposes

- > relief of poverty
- > advancement of education
- > advancement of religion
- > protect the environment
- > uphold human rights
- > promote health
- > promote the welfare of animals
- > advance the appreciation of arts
- > provide disaster relief
- > address/prevent problems faced by children, youth, or families
- > promote the efficiency and effectiveness of the Canadian military
- > preserve significant properties and heritage sites
- > promote racial equality
- > promote volunteerism in the community at large
- > address the needs of the Aboriginal people of Canada
- > protect human life and property
- > promote industry, trade and commerce
- > promote the efficiency and effectiveness of other registered charities
- > relieve conditions attributable to being aged
- > relieve conditions associated with disability
- > provide public works, amenities, services, or facilities
- > uphold the sound administration of the law
- > provide for the rehabilitation of those involved in the criminal justice system



Before 2018: up to 10%

“Political Activities”



After 2018: up to 100%

“Public Policy Dialogue & Development Activities”
(PPDDA or P2D2A)



= lower risk; lower burden

But the “chill” continues to have residual effects

So we may. But *should* we advocate?

- ▷ The moral and institutional imperative
- ▷ And then, are there municipal, regional, provincial, federal, or regulatory policies that make it harder to pursue our activities or achieve our mission?
- ▷ Is it currently getting worse or better?
- ▷ What is the *risk* of *not* changing that?
- ▷ Is there something we could do?
- ▷ Is anything stopping us?

Our communities are counting on us.



“Our communities are counting on nonprofits to do advocacy, not just because it affects single issues, but it also strengthens democratic engagement generally.”

~Vibrant Democracy. Vital Communities.
(ONN/Samara Infographic)

Our missions & visions are at risk

There is no such thing as a
single-issue struggle,
because we do not lead
single-issue lives.

A U D R E L O R D E

wist.info

Towards System Change

- ▷ Each issue has multiple impacts
- ▷ Each mission is never ending
- ▷ Each one of us helps each other and needs each other
- ▷ A collective of visions

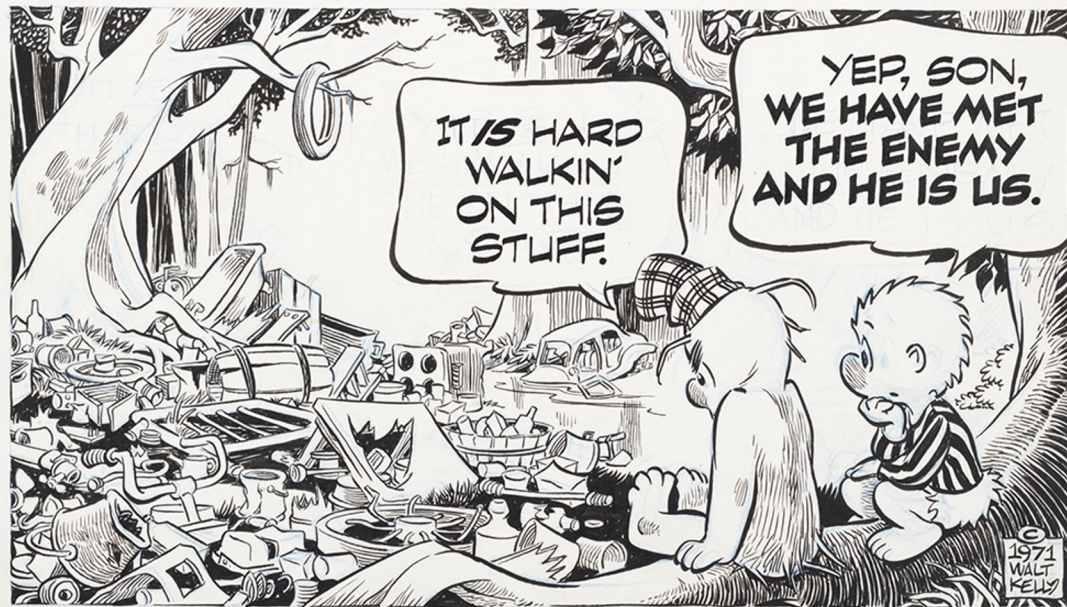
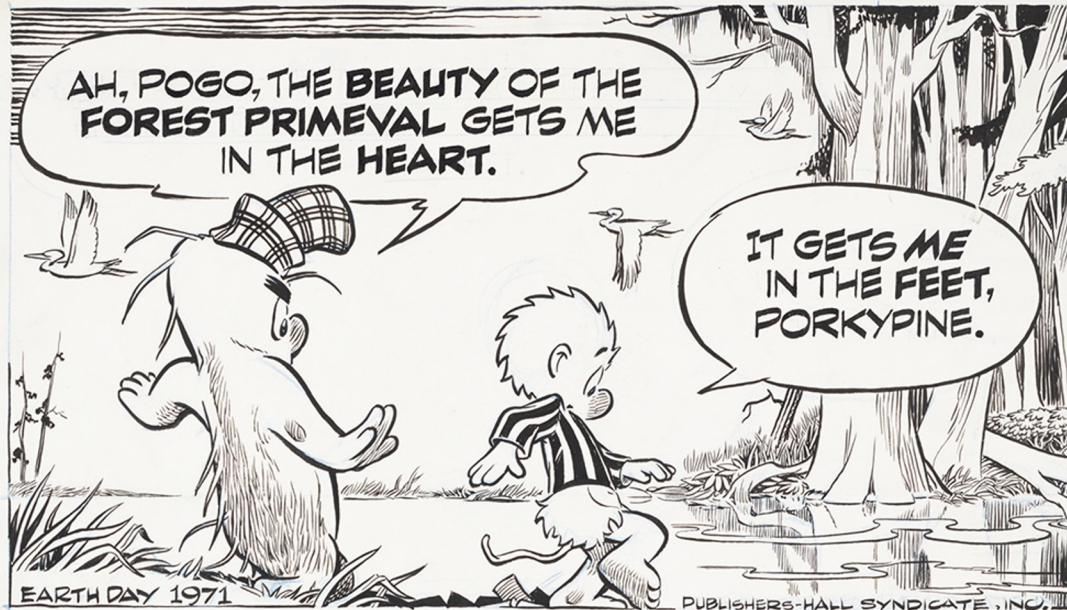
The Solution?



Our organizations are at risk, too.

▷ Is it getting easier or harder to pursue your mission?

- Workforce issues? Attracting, hiring, and retaining staff and leadership?
- Rising costs? Land? Rents? Food? Other goods and services? Affecting *your* costs? Is it affecting *demand* for your services?
- Do you have the information (data) you need to navigate these issues?
- Lowered revenues? Grants? Donations? Earned revenues?
- Volunteers?



What's stopping you?

- ▷ Residual effects of “advocacy chill”
 - No “policy muscle”
 - No history of advocacy or
 - Very limited advocacy (<10%)
 - Not an attractive space for change agents
 - Inertia: 5 years seems like a long time, unless you're talking about major organizational transformation
- ▷ A moment of opportunity

And so, you could . . .

- ▷ Ask “what changes outside of our organization do we need to seek so that our work and our outcomes will be better.”
 - What would address the needs we serve to reduce unmettable demand?
 - What would make it easier to attract and retain talented workers or volunteers?
 - What policy changes would accelerate your core mission?

And then . . .

- ▷ **Build those things into your organization** by making sure they appear in the next Strategic Plan, your organizational structure, your job roles, your impact reporting and, especially, your budget. This is how you build the muscle.
- ▷ **Be an ally while you build your own program**
 - Who's already doing the work? Join or support them.
- ▷ **Lean into your existing strengths:** Are you good storytellers? Good fundraisers? Good researchers? Could your case for support also be a “case for change?”
- ▷ **Consider how best to use your own influence** as a community leader in your own cause area, or others you think important.
- ▷ **Start anywhere, but start now.**

An advocacy spectrum from ONN



Low Barrier Policy & Advocacy Now

- ▷ City Multi-Year Budget info sessions and Public Participation Meetings
- ▷ Sustainability Summit
- ▷ Western U course “Connecting for Climate Change Action” – Free
- ▷ Series: Climate Action for Non-Profit Leaders – not free, may be what you need
- ▷ Provincial Pre-Budget Consultation
- ▷ Ease of finding provincial funding opportunities - consultation

References and more information

- ▷ On P2D2A, see Public policy dialogue and development activities by charities (canada.ca)
- ▷ On the prohibition of partisan activity, see Prohibited: Supporting or opposing a political party or candidate (canada.ca)
- ▷ On other legal requirements, see Other legal requirements (canada.ca)
- ▷ the Canada Elections Act; the Lobbying Act; the First Nations Elections Act; provincial lobbying and election legislation

References and more information

- ▷ “A short history of voluntary sector–government relations in Canada (revisited),” Peyton Carmichael and Peter R. Elson, *The Philanthropist*, 2022
- ▷ “A short history of voluntary sector–government relations in Canada,” Peter R. Elson, *The Philanthropist Journal*, 2007
- ▷ “System Change Agents: A Profile of Grantmaking Foundations Focused on Public Policy,” Peter R. Elson and Sara Hall, 2016

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- ▷ Report of the Consultation Panel on the Political Activities of Charities, March 31, 2017
- ▷ The Code of Good Practice on Policy Dialogue, 2002
- ▷ “Talking to (and with) the sector, Hilary Pearson,” *The Philanthropist*, 2023

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- ▷ “Building the charitable sector’s policy muscle,”
Tim Harper, The Philanthropist, 2023
- ▷ “The advocacy riddle,” John Lorinc, The
Philanthropist, 2022
- ▷ “The moral imperative for policy advocacy,”
Roger Gibbins, The Philanthropist, 2016
- ▷ ONN Advocacy Spectrum Tool
- ▷ ONN Election advocacy toolkit