

Meeting this Moment with Advocacy

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Module 1

Raising Our Voices: Advocacy for Non-Profits

WELCOME

1 Say hello

Your preferred name, pronouns, role, organization, location, and one thing you hope to learn today

2 Camera on please

Turn your camera on as you're comfortable

3 Mute

Mute yourself when you're not speaking

The Urgency of Now

- It has never been more important for organizations to have impact and build power and voice on behalf of communities
- We must stand up while safeguarding missions and organizations
- The more of us speak up, the safer we all are



We Want to Stand with You

This series is part of UnidosUS's Protect, Defend, and Advance (PD&A) Campaign to mobilize Latino communities to shape policy and respond collectively to harmful decisions.

- **A major goal is to build the power of our Affiliates and core civil rights partners.**
- **You are the best representatives of our community, and your voices are needed.**



Today's webinar
was designed
based on our
survey.

It taught us...

1

35% of Affiliates were not
doing any advocacy

2

Almost 70% of whom said
that training on non-profit
advocacy would be beneficial

3

Potential political repercussions
were the primary barrier to doing
more advocacy

UnidosUS + Affiliate Partnerships Advocacy in Action

Congress is fast-tracking a budget bill that hurts Arizona families



Email your member of Congress

Fill in your information below to send an email automatically to your senators and representative. Fields with an asterisk (*) are required.

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Email *	Address *
<input type="text"/>	<input type="text"/>

Send now



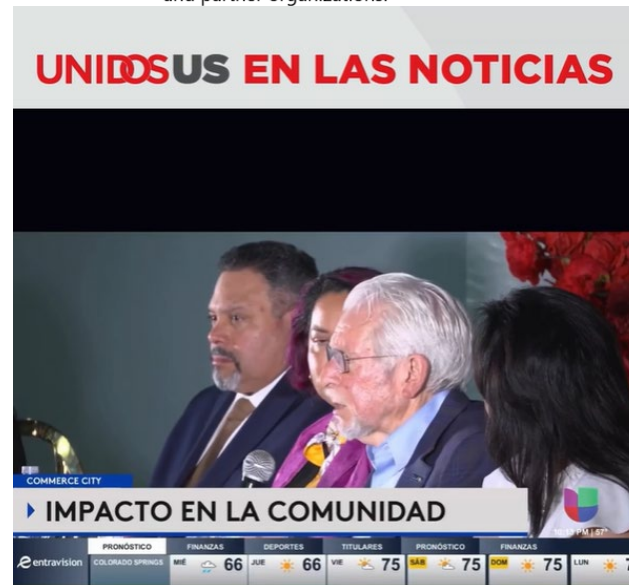
adelanteco and 2 others
Colorado

adelanteco 8w
When our voices unite, our communities grow stronger—join us in this townhall conversation.

On Wednesday, Sept. 17, join us at the Colorado Community Townhall in Commerce City with @weareunidosus and partner organizations.

EL CENTRO HISPANO

Powerful Roundtable with UnidosUS at El Centro Hispano



Protect, Defend, and Advance: Build Power

Goal: Build Power and hold decisionmakers accountable for the safety and well-being of our community

INFORM the community to build public understanding of the local impact of federal policy

Ground Game

- Community town halls/Roundtables
- Meetings with grassroots leaders
 - Webinars
- Engagement of elected leaders
- Coalition building

Air Game

- Amplification of events and general messaging via social and earned media
 - Story banking
- Influencer engagement
 - PSAs/videos
- Press releases/op-eds



INFLUENCE the conversation by elevating community voices and shaping public dialogue

Storytelling
Narrative framing
Publicly visible
Congressional responsiveness

Join Us!

Engagement Opportunities

LADDERS OF ENGAGEMENT

CHOOSE WHAT FITS YOUR CAPACITY



Light Engagement

- Share UnidosUS messages and graphics
- Use your platforms to inform, uplift, and mobilize
- Amplify stories on social media



Moderate Engagement

- Submit op-eds or letters to the editor
- Meet with your Member of Congress or their staff
- Invite your Member of Congress or their staff for a site visit or briefing



Deep Engagement

- Organize or co-host a town hall
- Mobilize your community for a press event or public forum
- Lead a storytelling campaign that centers lived experiences



Session Goal:

To build a foundational understanding of why to do advocacy and what to consider as you prepare to do it as an organization.

Please share in the Zoom chat—

How comfortable do you feel today engaging in advocacy?

- 1 — Not that comfortable
- 2 — Somewhat comfortable
- 3 — Very comfortable



Agenda

- 01 Your Path to Advocacy
- 02 What 501(c)(3)s Can Do
- 03 Lobbying vs. Advocacy
- 04 Staying Compliant
- 05 Real-World Examples
- 06 Reflection + Q&A

The background of the slide features a close-up, diagonal view of the American flag. The blue field with white stars is on the left, and the red and white stripes are on the right. The text is overlaid on this background.

The First Amendment

45 Words
5 Freedoms

*Congress shall make no law
respecting an establishment
of **religion**, or prohibiting
the free exercise thereof;
or abridging the freedom of
speech, or of the **press**;
or the right of the people
peaceably to **assemble**, and
to **petition** the Government
for a redress of grievances.*

Laying the Groundwork for Organizational Advocacy

1 ASSESS YOUR WORK

Review Mission

Does it address challenges that require or could benefit from policy change?

Examine Programs

Are you already educating officials or sharing community needs?

Assess Organizational Needs

Do you need advocacy capacity to advance your mission or protect your organization?



2 BEGIN TO ENGAGE

Build Relationships

- Connect with policymakers as a trusted community voice.
- Join coalitions working on your priority issues.

Ease Into Advocacy

- Invite a legislator to tour your facility (educational, not lobbying).
- Share community needs through regular program interactions.

Begin Light Tracking

- Notice where advocacy is already happening informally.
- Track any activities that may count as lobbying.



3 BUILD CAPACITY

Strengthen Staff Knowledge

- Train staff on advocacy vs. Lobbying
- Build understanding of key policy tools

Set Up Simple Systems

- Create basic systems to track lobbying activity
- Establish clear policies and procedures for advocacy

Plan Strategically

Develop a clear approach to strategy and prioritization

501(c)(3)s Have Significant Advocacy Rights

YOU CAN:

Educate legislators
about issues and
your organization

Respond to written
requests from
legislative
committees

Conduct
nonpartisan
research and
analysis

Discuss broad social
issues without
referencing specific
legislation

Engage in unlimited
non-lobbying
advocacy

Engage in a
generous amount of
lobbying
(within limits)

Defend your
organization's
mission and right to
exist

Examine and discuss
social, economic, or
other issues

Generally NOT Lobbying

Advocacy that is NOT generally considered lobbying includes efforts to:

- **Educate** legislators about your **mission** and community needs
- **Invite** legislators to **facility tours**
- **Provide** nonpartisan research and **objective data**
- **Respond** to written requests for **information from committees**
- **Host** educational or public **fora on broad social issues**
- **Organize** community members to share their stories or hold **town halls**
- **Inform** the public or community about **changes in policy**

Defining Advocacy & Lobbying

Advocacy

Any action that speaks up for an **issue or community**.

Protected by the First Amendment (organizational + individual).

Includes:

- Public education
- Litigation
- Community organizing on an issue
- Research or analysis not tied to a specific bill
- Regulatory work (*federal reporting may apply*)

Direct Lobbying: Communicating with a legislator to support or oppose specific legislation.

Grassroots Lobbying: Asking the public to contact legislators to support or oppose specific legislation.

Lobbying

Understanding Lobbying Limits

Direct Lobbying:

- Communication with legislators or staff
- References specific legislation
- Expresses a view on that legislation

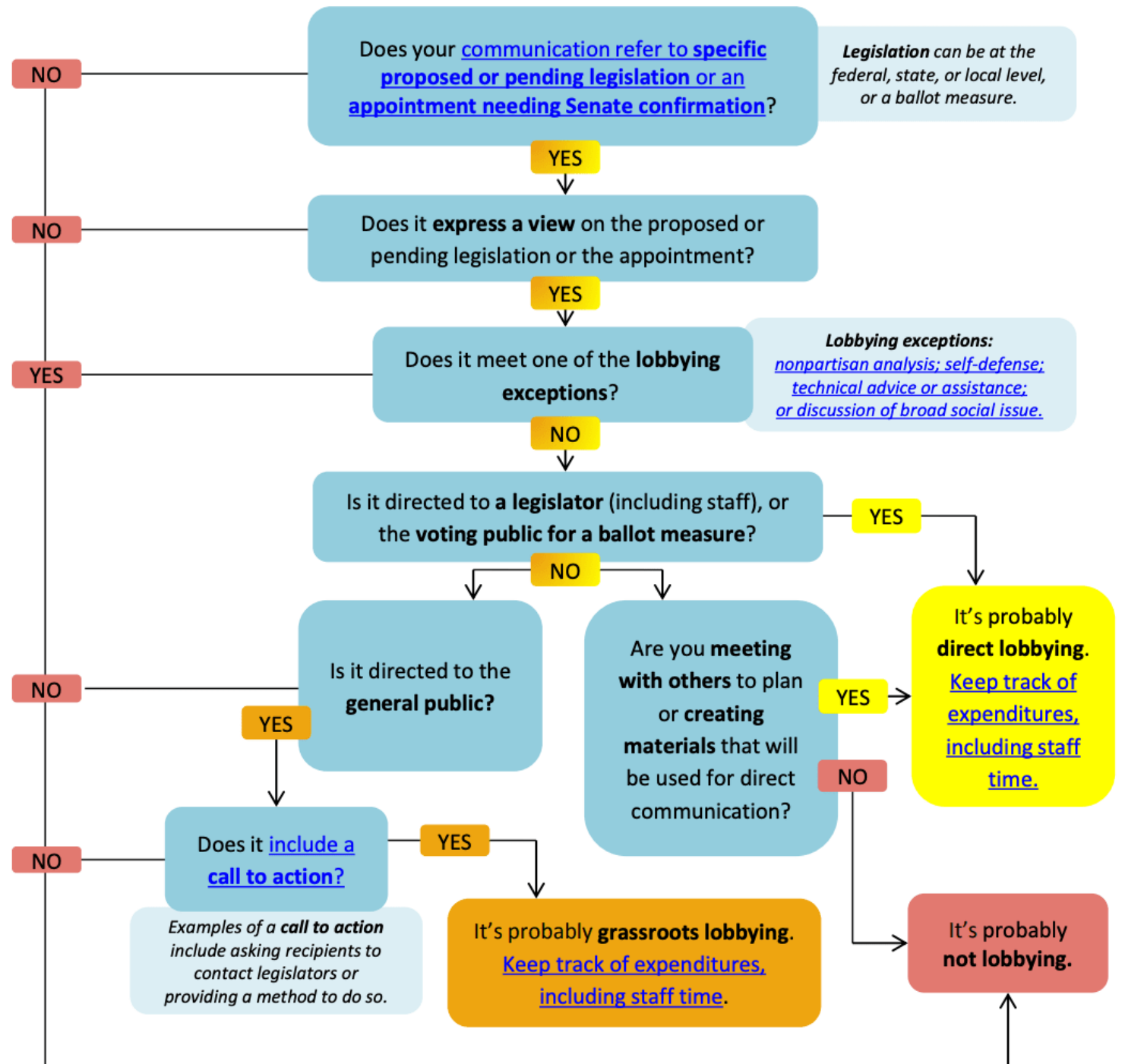
Grassroots Lobbying:

- Communication with the general public
- References specific legislation
- Expresses a view on legislation
- Urges public to contact legislators

IRS Lobbying Flowchart

No need to memorize this!

See the [Bolder Advocacy Resource Library](#) - Alliance for Justice

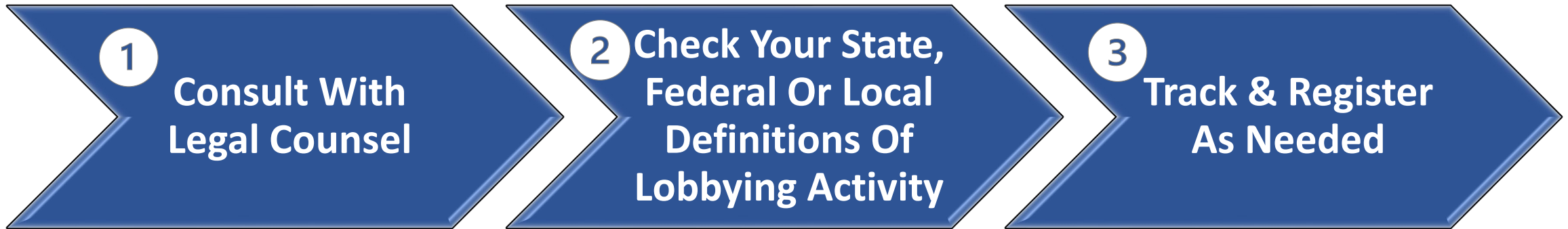


Your Words and Actions Matter

- **Words that can suggest lobbying:**
 - Influence, persuade, convince, pressure, urge
 - “Call your representative”
 - “Support/oppose this bill”
- **Words & actions that are generally not lobbying:**
 - Educate, inform, provide information
 - “Learn more” or “Join us”
 - “Share your story” or “Take action”
 - Building relationships with policymakers in general



If You Choose to Lobby...



It may look like:

- Communicating directly with legislators about specific legislation
- Meeting with legislative staff to discuss pending bills
- Providing testimony supporting or opposing specific legislation (if not asked)
- Organizing grassroots campaigns with calls to action (grassroots lobbying)
- Sending action alerts asking supporters to contact legislators (grassroots lobbying)
- Gathering signatures for or against ballot initiatives (consult counsel)

Practical Compliance Steps



Documentation:

- Create written advocacy plans with (c)(3)-permissible goals
- Track lobbying activities and expenditures
- Keep records of all communications about legislation
- Document staff time spent on lobbying

Best Practices:

- Review communications before sending
- Train staff on the differences between advocacy and lobbying
- Use separate funding streams as needed

Working Alongside 501 C (4)s

You **CAN** work alongside 501(c)(4)s BUT:

- Ensure your activities remain (c)(3)-compliant by working closely with counsel
- Don't allow your name/resources for candidate support/opposition
- Create separate advocacy plans for your organization
- Track your own activities independently and do NOT coordinate activities

Watch out for:

- Targeting based on voting patterns/party
- Activities designed to influence elections
- Messages that support/oppose candidates
- Coordinating actions and events



Key Takeaways on Lobbying

1. Federal law—including the **Constitution**—**protects your right** to robust advocacy
2. There are **generous legal limits** for lobbying activities for 501 (c)(3)s
3. Careful **language and documentation** protect your organization and rights
4. Most of your **advocacy work may not count** as lobbying, but stay alert
5. You can **work effectively in coalitions** while staying compliant if you know the rules

Remember:

State and local laws may have additional requirements.

A Few Hard Calls?

1) Your organization asks members of the public to contact the local school board about a school zoning question and to urge the board to vote no on an upcoming measure. Is it lobbying?

- **Answer: Under federal rules, No. A school board is not "legislative." But you might check out local and state lobbying laws to be sure no reporting is required.**

2) You plan to contact a member of Congress to request a meeting to suggest concerns about the funding levels for a program. Is it likely to be lobbying?

- **Answer: It depends on whether a piece of legislation is pending to fund that program or whether you explicitly ask for legislative action on the funding in the meeting.**

3) Your organization is generally under attack in the legislature and receives a written request to testify at a hearing before the committee. Is it lobbying?

- **Answer: No. It is both self-defense and officially requested testimony. It is also likely not about pending legislation. These are exceptions to the rule about lobbying.**



Affiliate Resources

Why Use the HUB?

Whether you're looking to strengthen your organization, engage your community, or access funding opportunities, the Affiliate Resource HUB is designed to support your mission—all in one place. **Sign up:** affiliates.unidosus.org/signup

Already receive the **Affiliate Digest**?

If not—

Sign up: unidosus.org/about/affiliates/digest-signup/



Share your **community's** stories



Tell us how your community is impacted by current policies and how you're responding.

UnidosUS is collecting stories to:

- **Advocate** for change
- **Amplify** community concerns
- **Inform** decision makers

Together, we turn lived experiences into collective strength.

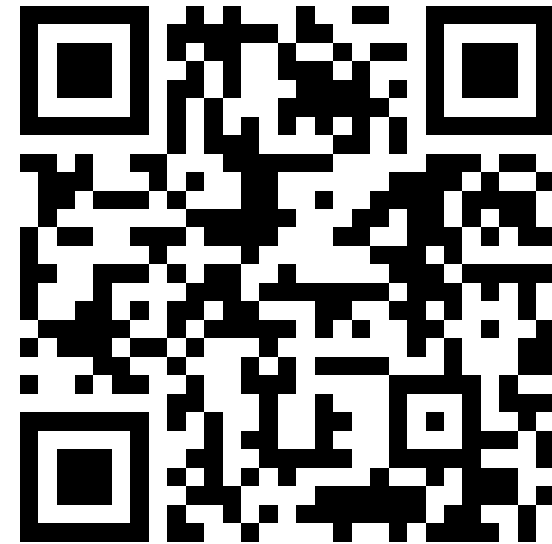




We want your input!

Your feedback helps us improve future trainings for our Affiliates!

Please scan the QR code to take our survey.



Questions

