

WORKING WITH LEGISLATORS

An Advocacy Briefing Guide for Board Members

One of the most rewarding things about serving as a nonprofit board member is the opportunity it affords to help create positive change. Board members who are hesitant to get involved in their organization's advocacy or lobbying efforts, however, may be missing out on a tool that can be very useful in advancing the cause they believe in.

One way that board members can stand for their missions is by meeting with legislators about important issues impacting their organization.¹ Oftentimes, board members' connections or standing in the community can help advance a meeting request. However, a board member's role does not end after the meeting has been scheduled. These tips can help board members adequately prepare to ensure the meeting is successful.

WHERE TO START

- 1) Fully understand your organization's mission, programs, and constituents, and how public policy impacts your ability to serve the community.
- 2) Monitor public policy proposals at the local, state, and federal levels that could advance or harm your mission. Become familiar with the individuals leading the charge.
- 3) Strategically select legislators your organization should target and inform about the work your organization does in the community.
- 4) Identify the board member(s) most appropriate to take the lead in forming relationships with legislators based on personality, standing in the community, or career position.
- 5) Ask for a meeting. It is best to start with a formal email to the legislator's office, then follow up with a phone call. However, if possible, making an appointment in person is the most effective method. Request a 30-minute meeting, but expect to only have 15 minutes with the legislator.



For more information about how to advocate for your organization as a board member, check out the Stand for

Your Mission campaign. Its goal is to inspire and challenge board leaders to "stand for your mission" through active engagement as ambassadors and advocates for their organizations' work. Download the [Discussion Guide](#) and a brief resource on [expectations for board members' leadership](#) to learn more.

HOW TO PREPARE FOR A SUCCESSFUL MEETING WITH A LEGISLATOR

Once you've identified the legislators your organization should target, the next step is to set up a meeting. To build a strong relationship with the legislator, you must be fully prepared for the first meeting.²

- **Learn from more seasoned board members.** Whether you are a newly elected or a more experienced board member, identify a long-tenured board member to serve as a mentor for you when planning your meeting with a legislator. Simply by being with the organization for a longer period of time, he or she may have valuable insights into how to best discuss its work and accomplishments. Your mentor can also help you practice your presentation and target legislators who are interested in learning about the organization.
- **Invest in building strong relationships early.** It can take time to develop a partnership with a legislator that results in him or her advocating for your organization and providing the support you need. Don't expect too much too quickly, and work to establish a good foundation early on. Oftentimes, targeting recently elected legislators, especially ones in the minority party, can pay dividends later on. Additionally, don't forget the aides and staffers. They will likely be the individuals you communicate with most frequently, so building a relationship with them is important as well.

¹ There are some regulations about nonprofit organizations working for or against specific pieces of legislation. Please refer to [the Stand for Your Mission site](#) for more information.

² Adapted from *The Nonprofit Board Member's Guide to Lobbying and Advocacy* by Marcia Avner.

- **Do your research.** Become familiar with the legislator’s bio, voting history, policy positions, and personal website. After learning about the legislator, think about who should join you for the meeting — three to four people is usually a good number — and appoint one member of your group the principal spokesperson. Consider including a policy staff person from the organization, a member of the community served by the organization, and a constituent from the elected official’s district.
- **Respect the legislator’s time.** Legislators are busy. You will likely only have a few minutes to present your information, so while it may be easy to pontificate on a subject you are passionate about, keep your remarks brief and get to the point quickly. Start the meeting by thanking the legislator for any past support, and mention if you are a constituent. Make sure your “ask” is clear so that the legislator understands your goals or expectations. Practicing ahead of time with a fellow board member or senior staff member can help you refine your talking points.

Additionally, always bring a one-page document you can leave with the legislator (and his or her aides) that presents the key points you discussed and provides contact information so that he or she can follow up.

- **Show your organization’s impact.** You will likely not be the only person discussing a cause with the legislator. To ensure your organization stands out, be prepared to show, rather than just explain, its impact. Don’t just state why your organization needs support; mention the good work you’ve already done and how you are working to achieve your goals. Tying your organization’s work to the legislator’s interests or past votes is another good way to help him or her connect to the issues.
- **Plan your exit.** It’s easy to spend so much time planning the middle of the meeting that you forget to think about how to close. However, wrapping up the meeting can be the most important part because it is the time to identify next steps. Ask the legislator if he or she has any questions or needs any additional information about your organization or its mission. Plan any follow up interactions (a tour of your offices, a return visit, etc.) and ensure you know the best way to contact the legislator if necessary. And don’t forget to write a thank-you note!

Sources: [Ten Basic Responsibilities of Nonprofit Boards](#), [The Nonprofit Board Member’s Guide to Lobbying and Advocacy](#), [Meet the Legislators: The Basics of an Effective Meeting](#) (Boulder Advocacy), [Personal Visits with a Legislator](#) (National Council of Nonprofits, Center for Lobbying in the Public Interest), [Meeting with Your State Legislators](#) (Colorado Nonprofits)

Questions about how to be sure you’re following the rules?

There is a lot of confusion about the rules and regulations around nonprofit advocacy, in part because the legal guidelines are different for different types of organizations. [Take a look at the full slideshow, What Boards Need to Know, for more information.](#)

| | 501(c)(3) Public Charities | 501(c)(3) Private Foundations | 501(c)(4), 501(c)(5), 501(c)(6) |
|---|---|---|------------------------------------|
| Legislative Lobbying Working for or against specific pieces of legislation of ballot measures. | Must be reported and within legal limits Use IRS form 501(h) to simplify reporting | Prohibited, except with specific exceptions | Unlimited |
| Broader Advocacy Most things related to public education, research, and educating policymakers | Unlimited | Unlimited | Unlimited |