



Philanthropy's New Playbook for Policy Advocacy

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Advocacy Activities



Conduct independent, nonpartisan research



Develop model policy, regulations, and administrative rules



Build relationships with legislators



Educate legislators about a broad range of issues



Meet with legislators to discuss the scope and impact of the foundation's work



Train grantees on how to lobby



Conduct public education campaigns



Offer technical assistance to legislators



Communicate with legislators or government agencies



Pursue policy changes and influence administrative practices through litigation



Sign on to an amicus brief or fund litigation



Build coalitions to coordinate an alliance of stakeholders

Lobbying

	Private Foundations	Public Foundations/Community Foundations	501c4	LLC
Lobbying/Legislative Activities				
Direct Lobbying	No, except self defense	Yes, insubstantial amount	Yes	Yes
Grassroots Lobbying	No, except self defense	Yes, insubstantial amount	Yes	Yes
Support Grantees that Lobby with Earmarked Lobbying Grants	No	Yes	Yes	Yes
Support Grantees that Lobby with General Support and Project Grants	Yes	Yes	Yes	Yes
Support Nonpublic Charities (e.g. 501c4 social welfare charities and unions)	Yes, if exercise expenditure responsibility and lobbying prohibition in the grant agreement	Yes, if it is an activity the foundation could participate in itself	Yes	Yes

Election Related Activities

	Private Foundations	Public Foundations/Community Foundations	501c4	LLC
Political/Election Related Activities				
Make Political Contributions	No	No	Yes, if consistent with tax-exempt purpose	Yes, with some limits
Support or Oppose a Candidate for Public Office	No, Absolutely Prohibited	No, Absolutely Prohibited	Not Publicly	Yes
Nonpartisan Voter Education Activities (i.e. candidate education, get out the vote)	Yes	Yes	Yes	Yes
Voter Registration Activities	Yes, special restrictions	Yes	Yes	Yes