

*Rules and regulations can have a positive or negative impact on your nonprofit and the people you serve. That's why it is important for organizations to stay up-to-date on what is being discussed and decided by lawmakers at the local, regional, state and national levels. Nonprofits should also be ready to mobilize an "army of activists" at a moment's notice.*

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At IPM Advancement, we are often asked to address two fundamental questions about engagement: "What is advocacy?" and "Why is having activists important to my nonprofit?"

Nonprofit advocacy is the art and science of mobilizing constituents and empowering them to become activists who can champion your cause or issue. It is an opportunity you give individuals to make their voices heard on key issues that affect *their* lives, and *your* nonprofit organization.

Used appropriately by nonprofits, advocacy can be an effective way to help policymakers better understand issues, hear from constituents, and be more informed about potential solutions to problems. However, it is important to understand that advocacy is not the same as lobbying.

Lobbying involves activity that directly supports or opposes specific legislation. While many nonprofits engage in lobbying, the IRS has strict rules about what portion of a registered nonprofit organization's budget can be allocated for these types of activities. There are strict reporting requirements for lobbying activities, and federal funds cannot be used for lobbying.

Unfortunately, many nonprofit professionals conflate advocacy and lobbying. As a result, they self-impose limits on *any* engagement with supporters that could threaten their organization's nonprofit status or put at risk any federal funding they receive. These nonprofits are missing out, because when an organization successfully engages in advocacy, it gains an opportunity to inform, focus and amplify a powerful collective voice.

Given that our current political landscape is rife with lobbying, it is crucial for nonprofits to stay informed and engage with lawmakers. The decisions made by policymakers at all levels have a significant impact on nonprofit organizations and the people they serve and can affect an organization's ability to fulfill its mission.

## Building Your Army of Activists

Building an army of nonprofit activists is a crucial investment in the future for most established nonprofit organizations. The day will almost certainly come when you will need “boots on the ground” to amplify your concerns about an issue and champion a proposed solution.

So, while you can't build an army overnight, you can put in place a smart strategy to engage supporters and prepare them for a time in the future when your organization will call them up for duty.

To begin, consider three key phases of advocacy engagement: **RECRUIT**, **ENGAGE**, and **MOBILIZE**.

### PHASE 1: RECRUIT

By applying the same fundraising techniques you use to engage donors and prospects, you can recruit individuals who share your philosophy and are willing to get involved. In our experience, a multi-channel approach that leverages digital, phone and direct mail provides the best opportunity to match willing constituents with your army-building effort. Presenting target audiences with two asks – one fundraising and one advocacy – is a simple way to increase response rates and convey to supporters that their value goes beyond just being a donor. Furthermore, studies show that donors and prospects are more likely to give when a fundraising ask is coupled with an advocacy call-to-action.

### PHASE 2: ENGAGE

Keeping your army engaged is crucial to success. With any political issue, there are peaks and valleys of public interest – and it's the latter that trips up most nonprofit organizations. It is easy to recruit supporters and mobilize activists when an important issue is front-and-center in the public eye. However, once media coverage and attention spans fade, nonprofit organizations often fail to keep activists meaningfully engaged. Your organization needs to be prepared for this drop-off by developing an evergreen strategy to keep supporters informed, sustain interest in your key issue(s), and highlight personal stories that continuously bring the issue(s) to life. Given today's ever-shortening attention spans and “outrage culture,” it's more important than ever to keep troops engaged so they're ready at a moment's notice to help you make the most of a rapid-response call-to-action.

### PHASE 3: MOBILIZE

Successful nonprofits know how to mobilize activists on a moment's notice. Thankfully, communications platforms have come a long way since the early days of nonprofit advocacy. Instead of rallying troops by fax, phone, and word-of-mouth, we can now leverage social media and digital ad platforms to get the word out. Of course, there are challenges that come with accessibility and convenience. Nonprofit professionals need to remember that not all individuals will be willing to engage at all times on all issues. People have lives, and many are overexposed to “urgent” requests for their attention and support. Not only that, they are more polarized than ever when it comes to taking political positions on issues. *What does this mean for you?* Messaging and positioning matter — especially if your nonprofit works across multiple issues. However, focus on giving your troops clear, compelling, timely, and personally relevant marching orders, and you will increase the likelihood that a high percentage take action when called upon.

**In addition to the RECRUIT, ENGAGE and MOBILIZE phases, consider these seven tips for a successful advocacy effort.**

### **#1 — Hone your message**

Don't guess when it comes to identifying effective messaging on key issues. Instead, test messages with your target audiences in order to identify what resonates and, more important, what turns people off. Taking time each year to survey supporters and conduct focus groups can inform compelling, authentic messaging that will help you speak to constituents in the most engaging way possible.

### **#2 — Be strategic in your deployment**

As you plan for deployment (getting your message out to audiences), try to avoid rolling out large, one-size-fits-all campaigns. Instead, use the insights and feedback gained from surveys and focus group testing to tailor messages to your target audience(s). Optimize response by taking the same approach as your fundraising effort — matching your message, positioning, call-to-action, and delivery to your target audience(s).

### **#3 — Test and refine**

Donors and prospects are most motivated to engage in advocacy efforts when the issue is compelling, timely, and personally relevant. But in many ways, the intersection of these attributes is a moving target. By continuously A-B testing your messages and calls-to-action — especially in direct mail and e-mail — you can identify what resonates in real time with target audiences given the communications environment. As you refine your messaging, just remember to avoid testing more than one variable at a time.

#### #4 – Focus on specific engagement opportunities

The more specific you can be when providing opportunities to engage in advocacy efforts, the greater your likelihood of participation.

*“Join us on <date> to hear the <legislative committee> discuss <issue>.”*

*“Take part in our rally for <issue> on <date> at <place>.”*

*“<Lawmaker> will host <event> on <date>, and we want you there with us!”*

*“Call in to <radio\_station> on <date> to make your voice heard on <issue>.”*

Your supporters already get plenty of broad-scope requests and general information on issues of interest. Show that your organization truly values their time, energy and involvement by focusing on specific engagement opportunities.

#### #5 – Connect your advocacy efforts at all levels

Whether using paid advertising, on-the-ground organization tactics, or coordination with third parties, it is important to keep your target audiences fully informed of advocacy efforts. When spokespersons are interviewed, be sure they reference the same web URL, hashtag(s), and phone number individuals can use to get involved. In cases where field tactics are crucial to success, encourage organizers to share individual social media updates, and then repost on your main account to build awareness and increase engagement. If there is an earned media effort, prepare talking points and provide training and guidance across your organization to ensure consistent messaging. Also be sure to share positive earned media coverage with your constituency as a way to reinforce desired perceptions of the organization’s impact, value and worthiness.

#### #6 – Manage the firehose

It’s natural to want to share news of every point you score in the game. But oftentimes, that level of detail is too much for the average supporter. While you may not be able to control what constituents see from third-party sources, it is important to strike a balance between keeping folks well informed and sharing specific, meaningful calls-to-action. Again, it comes back to making sure advocacy communications are compelling, timely, and personally relevant. As soon as constituents begin to feel overwhelmed and/or overleveraged, nonprofits run the risk of alienating them for advocacy efforts.

#### #7 – Keep requests reasonable

There’s an old saying in retail: *You can’t have a ‘Going Out of Business’ sale every week!* Many of your supporters will help if you ask. However, asks need to be reasonable in terms of frequency and difficulty. It is unlikely that the advocacy issue at the top of your

organization's list is the most important thing in your constituents' lives. That said, with some finesse and a focus on making requests timely, relevant and compelling, you can put your engagement opportunity on many individuals' to-do lists.

## Conclusion

When a nonprofit works to inform people about key issues and mobilizes advocates to take action, that organization not only fulfills a promise to constituents — it also serves the greater good. Effective advocacy can help virtually all causes. But real progress, especially via legislative change, is a team effort that can take months, years, or even decades. That's why it is so important to have a plan to build your army of activists and keep them engaged over time with good information and meaningful requests.

**Questions?**

Email us: [contact@ipmadvancement.com](mailto:contact@ipmadvancement.com)



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