

# Community Action Advocacy & Messaging

June 2017

This advocacy and messaging tool kit has been developed by the National Community Action Foundation (NCAF) for the Community Action network after the release of President Trump's FY 2018 complete budget proposal.



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## *Using This Toolkit*

This toolkit has been prepared with United States Congress in mind. In general, we want to use the Trump Administration's elimination of CSBG to demonstrate to Congress, and to our neighbors, what our communities stand to lose without Community Action.

As you know, these are ever-changing times, and the best advocacy and messaging requires timely information. Please make sure you are receiving e-mail updates from NCAF.

Additionally, NCAF is available to help you craft talking points, letters-to-the-editor, presentations and advocacy strategies unique to your agency. Please do not hesitate to reach out to us.

We also ask you keep us informed with any contact you have with your members of Congress. Ensuring we can reinforce your efforts is a priority for us.

Please do not hesitate to contact NCAF!

NATIONAL COMMUNITY ACTION FOUNDATION

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## *Advocacy Pro-Tips*



1. Make sure you are signed up to receive e-mails from NCAF for up-to-date information. Go to [ncaf.org/membership](http://ncaf.org/membership) if you are not.
2. Reach out to NCAF for help crafting agency-specific talking points, letters-to-the-editor, and presentations. NCAF can be reached at 202-842-2092.
3. Without ever lobbying, agencies can maintain relationships with members of Congress by keeping them up-to-date with contacts for help with constituent services or information on community programs.
4. The best messengers are those unpaid by the agency – board members, volunteers, community supporters, and local elected officials.
5. Let NCAF know of any contacts you make or plan to make with your member of Congress!

## Advocacy

ad·vo·ca·cy

/ˈadvəkəsē/ 

*noun*

public support for or recommendation of a particular cause or policy.

"their advocacy of traditional family values"

*synonyms:* support for, backing of, promotion of, championing of; [More](#)

- the profession or work of a legal advocate.

If you've had a chance to participate in David Bradley's workshop "The Forgotten History of Advocacy in Community Action," you know that it is in the DNA of Community Action to advocate for the poor. Furthermore, did you know that the Community Services Block Grant, which authorizes the existence of the Community Action network, is the only legislation in the books with the statutory intent of "[reducing] the causes and conditions of poverty?" What does this mean for us?

We are uniquely tasked, by both our history and the federal government, to understand and to address the issues facing the poor in our communities. Implicit in this responsibility is the need to work for and support the best interests of those we serve. In other words, being a part of Community Action is essentially synonymous with being an advocate.

Of course, in order to execute our duties, we must advocate for all of Community Action. We must speak for the necessary resources and important framework that allows us to, in turn, advocate for our communities. This common framework allows for the specific designation of Community Action Agencies, a strong national network, and unique agency designs that incorporate the tripartite board.

Throughout our history, Community Action has routinely faced legislative obstacles and rallied to push them back. From President Nixon's abolition of the Office of Economic Opportunity to President Trump's proposed elimination of the Community Services Block Grant, our network is no stranger to adversity. Even during times that might seem more certain, we have had to overcome obstacles. The Obama administration wanted to slash CSBG funding in half, which is now used as an excuse by the Trump administration to completely eliminate the program. In 1995, as part of the Contract with America, CSBG was on the chopping block—it received the largest percentage funding increase of any domestic discretionary program. Regardless of the threat level or political actors involved, the Community Action network continues to prevail.



When we face opposition, one of our greatest advantages is that we have a footprint in almost every community in the United States. This means we have thousands of advocates throughout the country and multiple methods of advocating for our network, along with ample opportunity to advocate.

Not all advocacy efforts are defined as lobbying activity. Lobbying may be thought of as hard power advocacy, and non-lobbying activity may be thought of as soft power advocacy. A direct conversation with your legislator involving specific legislation and federal funding is lobbying—it likely involves asking them for their support of the legislation or funding. General conversations and updates about your programs do not count as lobbying activity. Both lobbying and non-lobbying advocacy are crucial to Community Action.

*Contacting a member of Congress for support of a specific piece of legislation or funding stream is lobbying.*

Giving your member of Congress a tour of your agency or keeping your member of Congress informed on programs and services your agency provides **will not be lobbying if there is no discussion of legislation or the federal budget or appropriations.**

## Lobbying

*Am I allowed to lobby?*

Yes!!!

*I've been told I can't lobby . . .*

Nonprofit, 501(c)(3) Community Action Agencies (CAAs) and their staff and board members **absolutely CAN** lobby; you just need to pay any lobbying costs with restricted, non-federal funds and they need to track their lobbying time, costs and activities for reporting on IRS Form 990 (don't worry, reporting lobbying on the Form 990 does not increase the chances of an IRS audit).

Whether a public (i.e., governmental) CAA, its staff and board members may lobby on behalf of the CAA will depend on state and/or local law. Any lobbying costs a public CAA may incur must be paid out of non-federal, unrestricted funds.

**Staff and board members of CAAs also have first amendment rights to lobby as individuals on their own time, outside of the office and using their own personal phones and computers.**

Silence on our programs during this time is not an option, so it's important to have a plan for getting the message through to members of Congress, whether or not your organization has non-federal, unrestricted funds to spend on lobbying.



## What if your CAA has limited or no non-federal, unrestricted funds that it can spend on lobbying?

Work with your board, volunteers and community members to get the word out!

Here is one thing you can do:

1. **Step 1:** Appoint a board member or community supporter to lead lobbying efforts on his or her personal time with his or her personal resources.
2. **Step 2:** Make sure that person receives e-mails from NCAF so as to see any “call to action.”
3. **Step 3:** Make sure the point person knows they can directly contact NCAF with any questions or necessary assistance.

Remember, David Bradley and NCAF are your national lobbyists, and we lobby every day on behalf of Community Action programs. If we know you are unable to directly lobby a member, we will help find a pathway to connect that member to the necessary information. Further, if any legislative issues or questions are raised, loop NCAF in. We are able to discuss legislative matters with Congress and might have a prior relationship with the member.

If you have questions about the legal rules on lobbying, contact CAPLAW.

## Important Non-Lobbying Activities

Creating and maintaining a relationship with a member of Congress, which is crucial to Community Action’s survival, does not need to involve lobbying activity. As a community organization, you should hope to have a collaborative relationship with your members of Congress based on your common goal to improve your community. Keeping your members informed about your programs and services is considered essential information for your members of Congress and their staff. NCAF is here as a resource; we know a lot of members. We can—and will—help build professional and personal relationships.

### *A Special Note on Constituent Services*

*Keeping your members informed about your programs and services is considered essential information for your members of Congress and their staff.*

One of the more important non-lobbying congressional interactions you can have is with the constituent services team on your legislator’s staff. Essentially, congressional offices dedicate a significant portion of their time to help constituents who request assistance. The severity of these requests varies, from passport expedition requests to IRS complications to VA or Social Security appeals to labor disputes. Often,

individuals who call a congressional office require immediate assistance to alleviate difficult issues such as unemployment and utility shut-off by a provider. In many congressional districts, Community



Action Agencies are the first referrals in these situations and provide a great relief for the member's office.

One of the most beneficial items you can give your member's office is a resource sheet. The sheet should provide contact information for agency staff that can be a resource for the member's office and information on the programs the agency provides. Checking in with your member's office annually and giving them an updated resource sheet is a great way to establish and maintain a relationship without lobbying.

*Some folks have asked how to approach members of Congress who have been unsupportive in the past – this is a great way to open the door to a good relationship. One CAA kept at building a collaborative relationship with a very resistant member of Congress for a few years, and now that member has contacted the CAA to participate in a veteran's service fair he is hosting because the agency is the provider of Supportive Services for Veteran Families. Often, before a member becomes supportive of Community Action, he or she must understand the value of Community Action. Unfortunately, our invaluable impact is not immediately obvious to everyone, and it may take time to demonstrate.*

### *Other Non-Lobbying Activity*

Other important non-lobbying congressional interactions include hosting congressional members at agency events and taking them on organizational tours. **As long as no specific pieces of legislation or funding levels are discussed, this will not count as a lobbying activity.** These vital interactions with

members of Congress allow you to provide updates on your agency and specific programs you believe the representative might appreciate. You can also take this time to discuss programs that you are particularly proud of. You will create a personal relationship, get to know your member better and begin the process of establishing or solidifying trust - all without the act of "lobbying."

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It is vital that you keep NCAF apprised of important developments or happenings within your agency, especially if your agency and its staff are limited in their ability to lobby. When NCAF has certain action items regarding specific legislation (such as CSBG reauthorization – we will explain this later), we need to possess intimate knowledge of your agency while approaching members of Congress. Whether that information includes the creation of new programs and partnerships, or simply improvements, let us know! Clearly, NCAF can lobby - and we will be sure to pass this information along to members of Congress on your behalf.



## Messaging

One of the more complex aspects of congressional interaction is effective messaging. In order to be as effective as possible, take the time to carefully plan and craft a messaging strategy. First, identify your message and the method of contact you should use. Next, select the most effective messenger from your agency. Finally, use every resource at your disposal—including NCAF—to design your message in a manner that will create maximum impact.

### Identify Your Message

So you're contacting your member of Congress. The first step in this process is clearly identifying your message. Are you contacting them regarding a specific push (e.g., CSBG reauthorization) or simply providing an update on your agency and the services you offer? It is important to not overload your communication with lots of different messages, as they can be lost among one another. Rather, maintain a majority of your focus on the most pressing item. Once your primary message is identified, you can begin to hone the most effective, succinct means of communicating it.

### Methods of Messaging

There are several ways to make contact with your members of Congress, both for non-lobbying and lobbying purposes. It may seem obvious, but just in case it is not, we'll list a few:

1. **Send an e-mail to the member's staff**
2. **Call the member's office**
3. **Send a letter to the member**
4. **Meet with your member in his or her office**
5. **Attend a "Congress on Your Corner" or "Town Hall" Event**
6. **Invite your member to visit your agency or participate in an agency event**
7. **Tweet**
8. **Write a letter-to-the-editor mentioning your member(s)**

At the end of the day, we want bipartisan support for what we're doing—and there are millions of advocates for thousands of causes. We are the only ones entrusted with the future of Community Action. Communications to members should be thoughtful, deliberate and considerate. For example, tweeting at your members or mentioning them in a letter-to-the-editor is a very public action and should be as positive as possible, like thanking them for ongoing support. Voicing public disapproval, while perhaps cathartic, might set your relationship with the member back. Make no mistake about it—your member will remember what you tweet or write about him or her, be it positive or negative.



A phone call or e-mail might be used to convey brief information, such as asking a member to sign on to a Dear Colleague letter circulating in either the House or Senate on a specific piece of legislation or appropriation request.

Face-to-face meetings with your member or member's staff are extremely effective. It is easier to forge a relationship in person than through electronic communication. However, in-person meetings are harder to come by than e-mail conversations—especially with the members themselves. Be sure you and your team are prepared for these meetings: assign roles (including a primary presenter), possess all necessary information on your agency and CSBG, as well as a specific agenda. Meetings are more effective when you have a personal connection with the member. Are you from the same hometown or did you go to the same school? Can you say hi from a friend in common? Again—please invite NCAF to participate if your member is visiting.

Offer reminders of the importance of Community Action at local events hosted by your member of Congress. At these Town Halls or Congress on Your Corner events, you will get a firmer grasp on the perspective your member brings. From there, you can craft your messaging to better appeal to their priorities. Is your representative particularly worried about homelessness? Now you know to focus on your programs that address this issue while discussing your agency. At such meetings, it is important to keep in mind that you are the local spokesperson for Community Action. If you speak out on other issues, regardless on how important they are, you may weaken your ability to advocate for Community Action.

Similarly, you can create a more intimate familiarity by hosting your members of Congress at your organization. Successful site visits are perhaps the best means to secure support for Community Action and even create Community Action Congressional Champions.

### Choose a Messenger

Is the message lobbying-based or non-lobbying-based?

In the section “I’ve been told I can’t lobby,” we discuss having a board member, volunteer or other community member associated with the agency manage lobbying efforts on behalf of the agency. The truth is, even if the executive director is free to lobby whenever and wherever he or she wants, executive directors are not necessarily the best messengers to Congress.





The most persuasive messenger, in lobbying-based activities, will not have a personal stake in the survival of the agency, such as employment. Good messengers may be board members, partners, business leaders and locally elected officials.

The best messenger also depends on the audience. If someone on your board has a personal relationship with a member of Congress, they may be the best messenger—particularly in a face-to-face meeting, as there is already an established familiarity and trust.

If you have a community partner, particularly in the private sector, that is willing to visibly advocate for the agency, having them present at an agency tour, write a letter-to-the-editor or provide a letter of support when you meet with your member can go a very long way. It's about showing the wide range of support that Community Action has throughout every segment of the community.

There will be times, when meeting with a member, that having a letter of support from the mayor and/or governor will be an important boost to the messenger. If you'd like input on when to employ this technique—and the best language to use in these letters—please let NCAF know.

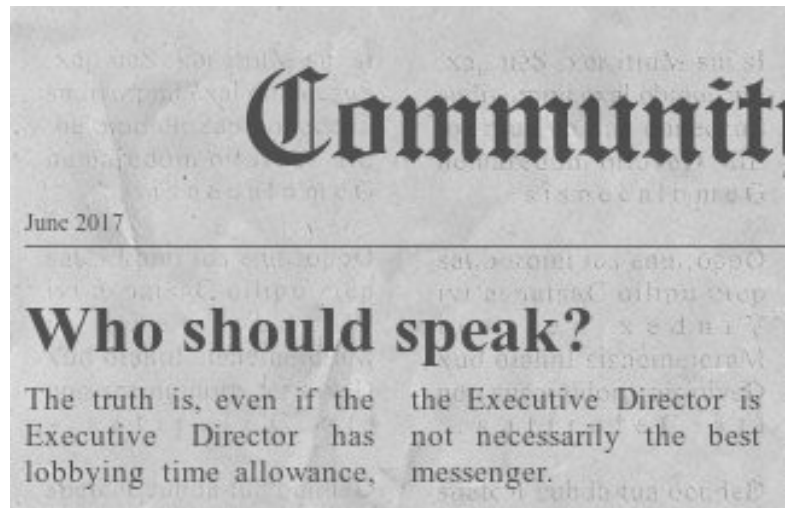
### Crafting a Message

Now that you've homed in on your primary message and chosen your best messenger, it is time to focus on and craft the message itself. By just following a few tips, your congressional messaging can be even more effective than it already is!

#### Word Choice

While word choice may be less important when speaking with a true blue Community Action supporter, word choice can matter greatly in conversation with members or staff who require persuasion.

When talking with a member or staff, try when possible to speak about people served in a relatable way. When we use terms to describe people that are un-relatable to the audience, unconsciously the listener's brain turns the information down. For example, if we say to congressional staff the "poor individuals in our community," the staffer's brain will unconsciously start to tune out because it recognizes the information as not relating to them, because they are not "poor." But if we say, "hard





working folks who have lost their jobs,” the listener's brain is more likely to stay activated because they understand themselves to be “hard working.”

Similarly, instead of describing programs for the elderly, you may want to say, “we provide programs for people who have worked their entire lives, paid into Social Security and Medicare, but still need assistance.” We recognize communicating in this manner is not always possible, and it does require being very descriptive as opposed to relying on shortcut words (poor, unemployed, disadvantaged), but in a persuasive conversation, it can be very useful.

*It is important to avoid certain marketplace terms—like “customer”—when describing your work to members of Congress.*

It is also important to avoid certain marketplace terms—like “customer”—when describing your work to members of Congress. While we understand the word customer provides dignity for the people you serve, in Washington, it reinforces a negative image of an anti-poverty

marketplace that is interested not in making people self-sufficient but in staying in business. This is also why the best messenger is actually someone who does not depend on the organization for his or her livelihood. When describing the people you serve, try to speak in the terms of Congress and use the word “constituents.” This being said, it is important to keep in mind that other marketplace terms – “innovation,” “leveraged dollars,” and “results-oriented” – are great words to use.

If you need to prepare persuasive talking points or documents specific to your agency, please do not hesitate to reach out to NCAF to workshop ways of describing your work and people impacted.

### *Important Messages Today*

To say the least, Washington is tumultuous right now. While we have many battles ahead, the current, most pressing fight surrounds funding for programs vital to the Community Action network - including the Community Services Block Grant (CSBG) itself.

As previously stated, while the President’s budget will never be accepted by Congress, having the Administration zero out core programs gives us the opportunity to demonstrate to our communities and representatives what they stand to lose if the programs were actually eliminated.

Supportive Senators and Representatives may want you to contact them and provide them with stories of what the community stands to lose so that when speaking about the potential elimination of CSBG on the floor, they will have an anecdote to share for the record. A phone call and letter writing campaign assault of the office is not necessary for this type of contact. Rather, you may want to collect a group of success stories that wouldn’t be possible without CSBG, and send those on to the member to



use as they see fit. Aggregating information for supportive members is one way to reduce the amount of times we must activate the full network to contact members of Congress, which will help prevent advocacy fatigue in the long run.

Be sure to focus on the impact these funding changes would have on results—not simply the monetary amounts themselves.

Now is a good time to have supporters submit letter(s)-to-the-editor(s). Explain the importance of CSBG, what will be lost if funding is eliminated as proposed by the President and the great things you could do in your community if the funding were increased. Be sure to focus on the impact these funding changes would have on results—not simply the monetary amounts themselves. You can do this through describing a success story where an individual fell on hard times, through no fault of his or her own, and is now self-sufficient, and how that story wouldn't be possible without CSBG. Describe what programs may have to shut down or limit operations if CSBG were eliminated. Be sure to thank your member(s), both in the House and Senate, by name, for their support. When a member of Congress' name is mentioned in the paper, the article will be put in daily press clippings, compiled by the member's communication team, that get sent to the member's entire staff. We are happy to help draft these letters.

Many of you answered our call to action regarding the FY 2018 CSBG Dear Colleague letters, both in the House and Senate, requesting that Congress maintain current funding levels for the program. In a sense, these Dear Colleague letters were a direct showing of congressional opposition to the Trump budget—and, thanks to your help, many of your representatives signed on. The most effective means to gain congressional signatures was through e-mails and calls. However, when our push for CSBG and WAP reauthorization begins, it will take more than a phone call or e-mail.

### *Talking Points for Today's Message*

While CSBG might account for a small percentage of your overall budget, the block grant ensures the continued existence of nationwide network of Community Action Agencies. Without CSBG, agencies throughout the country may have to close or reduce services, and the now nationwide network of organizations will no fragment—eliminating the network's national prestige, power and resources.

When we talk to Congress, we generally must explain what Community Action is, and why CSBG is important to Community Action. Here is what we say:



### What is Community Action and why is it unique?

Virtually every county in the United States has a Community Action Agency (CAA) – typically a nonprofit organization with the sweeping mission of fighting poverty in the community it serves. [Insert state name] has a state network of [insert number of CAAs in state] CAAs, which in turn are part of a nationwide network of about 1,000 local agencies. These agencies help ensure a safety net for low-income individuals and families, but even more importantly, they create opportunities for people to move from poverty to economic self-sufficiency. CAAs address local causes and conditions of poverty with input from the entire community, including the low-income populations they serve. What makes these agencies unique?

- Each CAA has a *broadly representative governing board*, with mandatory representation from the low-income community, local elected officials, and a wide array of public and private community stakeholders, including local businesses and others with the capacity to create jobs and opportunities for low-income individuals.
- Each CAA designs programs and antipoverty strategies based on a *comprehensive community needs assessment*. This assessment identifies local causes of poverty and barriers to self-sufficiency, and determines effective and innovative ways to address these causes and conditions of poverty.
- Each CAA operates through *partnerships* with numerous public and private sector organizations and individuals, so that local communities benefit from a broad but coordinated range of resources and initiatives.

### Quick Themes That Work

Without Community Action:

- Local governments would be greatly burdened.
- There would be no local, innovative approach to addressing community poverty.
- The community would not routinely assess community needs.
- There will be reduced accountability in the programs that do remain to address community needs.
- Civic engagement and collaboration would decline, because of the lack of an organization that brings together partners and stakeholders from all parts of the community.

### What is the Community Services Block Grant and why is it vital for Community Action?

The Community Services Block Grant (CSBG) provides critical funding for the nationwide network of local CAAs. The Department of Health and Human Services allots grants to states; [Insert state name] received [insert state grant amount from FY2017] in FY2017. States retain a



small portion of their block grant for oversight, monitoring, technical assistance, and statewide antipoverty initiatives, but the majority of funds – at least 90% of each state’s allotment – goes to local agencies in the state. CAAs receive and administer other federal, state, local, and private resources, in addition to CSBG, and CSBG funds are typically a small component of a CAA’s overall budget. Why are these funds essential to the Community Action mission?

- *Through grants to states and local agencies, the CSBG Act defines, supports, and enforces the unique features of Community Action.* Local agencies must meet federal requirements to be formally designated as a Community Action Agency and receive CSBG funds. These requirements ensure that low-income individuals and others in the community have a voice in planning and oversight of local programs, that initiatives respond to identified needs, and that resources are coordinated and used effectively. States use their portion of CSBG funds to monitor local agency performance and coordinate antipoverty resources statewide.
- *CSBG is the only dedicated funding source that supports core Community Action functions.* CAAs are highly successful at leveraging their small CSBG allotments to obtain a wide array of other public and private resources that address local causes and conditions of poverty. This success results from the agencies’ formal designation as Community Action Agencies and from the extensive efforts of their staff and board members in conducting needs assessments, identifying resources, writing grant applications, and coordinating with community partners. CSBG funds support these critical activities, along with basic agency operations and infrastructure.
- *CSBG provides flexible funds to support gap-filling activities that address unmet needs, innovative initiatives to combat poverty and promote self-sufficiency, and rapid responses to urgent community needs.* CAAs identify causes and conditions of poverty that may not be addressed through an existing program or for which existing resources are not adequate. CSBG funds are used alone and in combination with other resources to support important antipoverty initiatives that would not otherwise be possible.

### *Guiding Your Messaging on CSBG in Your Community*

As you prepare your messaging on what your communities stand to lose with President Trump’s FY2018 budget, let the following bullet points be your guide.

### *Buzz Words*



What to stress in your communications on your work and CSBG:

- **CSBG is locally-controlled, flexible** funding that allows for **innovation and partnerships.**
- **Results-oriented approach**
- **Accountability**
- **Our agency enjoys implicit trust from vital communal institutions**
- **The tripartite board allows for different perspectives and a higher level of accountability**
- **Thorough needs assessment helps tackle most pressing community issues**



*\*Why we are focusing on CSBG: As you know, President Trump's budget also proposes the elimination of LIHEAP and Weatherization. You should definitely plan to talk about the impact of losing all of the programs you run. However, trying to explain the impact of losing all of these programs at once will weaken your message. Because CSBG is the spine of Community Action, we believe primarily focusing on it will help best illustrate the overall impact of Community Action.*

- Without CSBG, local governments will be overwhelmed by the demand of community needs that Community Action Agencies currently address. Provide an example of a program you currently operate that, if eliminated, the local government would have to address the need itself.
- Without CSBG, explain that your community will no longer have a formal infrastructure that requires the business community, local elected officials and low income representatives to work together to address the critical issues facing opportunity in your [town/city/county]. Describe the tripartite board structure, the members of your tripartite board and the process your agency uses to identify and address problems in your community, including the Community Needs Assessment. Give an example of how everyone came together to resolve a critical issue.
- Explain that, without the flexible local dollars from CSBG, your agency will not have resources to spur partnerships that benefit the community. Describe a partnership that you've forged that has benefited the community, and why the partnership would not be possible without CSBG.
- Explain that, without flexible CSBG dollars, your agency will not have funds available to respond to an urgent situation that arises within our community. Describe a situation where you were able to quickly address an urgent situation within your community.
- Explain how the loss of flexible, locally controlled CSBG dollars will eliminate opportunities for innovation. Describe how CSBG dollars can be used to fund innovative solutions that will improve the community. Many funding avenues are dedicated to specific activities. CSBG dollars are locally directed, which gives the community the opportunity to try new approaches that are specific to the community's needs. Give an example of an innovative program that could not have happened without CSBG.
- Without CSBG, agencies across the country will not be held as accountable in their ultimate goal of assisting individuals and families in becoming economically independent. Give examples of individuals and families that you've helped become economically independent.

Provide convincing stats when possible:

- How is your capacity affected?
- How many seniors, children, families and veterans will this impact?
- Which local programs will be eliminated? What vital community needs do these programs address? (i.e. job training, education, drug intervention, disaster relief)

### Coming Up Next

The most pressing messages for Congress from our network change. While we might be focused on the funding fight at this particular moment, there are several items on the horizon that also promise to be



of significant importance. To prepare you for the months, and years, ahead—please see our messages up next.

CSBG reauthorization legislation is on the horizon. As is an effort to reauthorize the Weatherization Assistance Program. Both of these efforts will require an all-hands-on-deck effort from the entire Community Action network. Please keep an eye out for “calls to action” (sometimes referred to as “Calling All Agencies”) from NCAF.

Undoubtedly, other important messages will arise. It is important that we, as a network, are always prepared to answer the call at a moment’s notice. This includes possessing the necessary information and updating it regularly rather than hoping to compile these items rapidly. Individual agencies, state Community Action associations, state CSBG offices, NCAF and other national Community Action partner organizations must all ensure that we continue to update information and records on each individual agency and state.

### *A Final Thought*

If we all work together to convey the same message to members of Congress, we can help ensure that the Community Action network will continue to bring together public and private community stakeholders – including local elected officials, representatives of the low-income community and leaders from the business sector – to create jobs and other opportunities for families and individuals to achieve economic self-sufficiency.