



NONPROFIT LEADERSHIP CENTER



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**Welcome to the Nonprofit Leadership Center
2025 Webinar Series!**

**Effectively Navigating the
Legislative Landscape for
Nonprofits**

**With Leah McDermott
Florida Nonprofit Alliance**

Our Presenter



Leah Donelan McDermott

**Program Director
Florida Nonprofit Alliance**

Rules of the Road...

- To minimize background noise and distractions, all lines will be muted for the duration of the webinar.
- This session is being recorded and will be available on our website for future viewing.
- We warmly welcome your questions. Please type them in the chat box. The trainer will answer questions at the end of the presentation.
- We're looking forward to a productive, engaging session and thank you so much for your participation!



Mission:

Florida Nonprofit Alliance is the state's collective voice, respected advocate, effective connector, and powerful mobilizer for the nonprofit sector.

Website:

www.flnonprofits.org

theforakergroup
Standing Beside Alaska's Nonprofits



HANO
Hawaii Alliance of Nonprofit Organizations

Current Legislative Landscape for Nonprofits

The background of the slide features a complex, abstract pattern of overlapping teal and light blue geometric shapes, primarily triangles and polygons, creating a modern and dynamic visual effect. The shapes vary in opacity and shade, with some appearing as solid dark teal and others as lighter, semi-transparent washes. The overall composition is clean and professional, typical of a corporate or organizational presentation.

Federal Executive Orders

- ▶ Targeted areas include:
 - ▶ Census
 - ▶ DEI
 - ▶ Education
 - ▶ Environment
 - ▶ Federal Funds Freeze/Grants and Contracts being reviewed
 - ▶ Free and Fair Elections/Nonprofit Advocacy
 - ▶ Food Assistance programs
 - ▶ Immigration
 - ▶ International aid
 - ▶ LGBTQ+
 - ▶ Public Service Loan Forgiveness Program/Student Loan Repayment
- ▶ Many Executive Orders are currently being challenged in court.

State Legislation and Executive Acts

- ▶ Florida “DOGE” in the Governor’s office
- ▶ Local penalties for not cooperating with federal immigration enforcement
- ▶ Honest Services Registry (HB 651)
- ▶ Registration of Agents and Organizations Associated with Foreign Nations (HB 583)
- ▶ Prohibitions and Limitations on DEI (SB 1710)
- ▶ Chief Arts and Culture Officer is Sec. of the Department of State (HB 1011)
- ▶ Potential cut in sales tax and/or cut in local government property taxes

Copycat Legislation

- ▶ Ideas introduced at one level of government being introduced at other levels
- ▶ Make sure you know how to track local legislation - county, city or other municipality

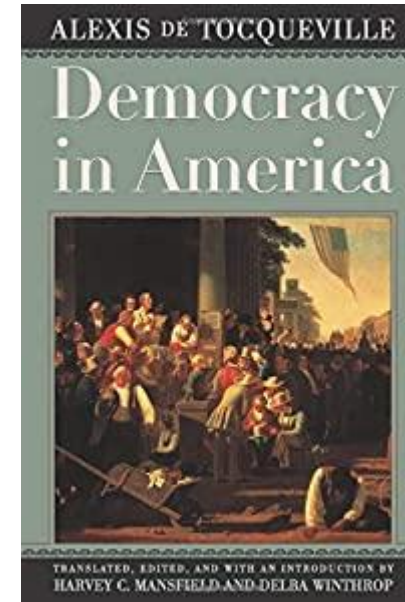
2026 Elections Start Now

- ▶ Special Elections following nominations from President Trump
- ▶ Even Numbered Florida Senate Seats up for election
- ▶ All 120 Florida House of Representatives up for election
- ▶ All 28 Congressional Districts up for election
- ▶ Special Election for US Senate seat
- ▶ Governor and Cabinet (CFO, Attorney General, Ag Commissioner)
- ▶ Municipal, County, School Board, Judicial Races, etc.
- ▶ Statewide Amendments?
- ▶ Barage of widespread spending for advertising, saturating media....

Advocacy - the whys and whats

Why Advocacy?

- ▶ Founding principle of our country
- ▶ Core rights to assemble and petition their government
- ▶ “Americans of all ages, all conditions, and all dispositions constantly form associations...religious, moral, serious, futile, very general and very particular, immensely large and very minute.”
- ▶ Examples:
 - ▶ Abolitionist societies ➡ Emancipation Proclamation
 - ▶ Farmers ➡ Granger laws
 - ▶ National American Women Suffrage Association ➡ 19th Amendment
 - ▶ Townsend Clubs ➡ Social Security Act
 - ▶ Southern Christian Leadership Conference (and many others) ➡ Civil Rights Act/Voting Rights Act



Why Advocacy?

- ▶ Advocacy is legal, needed, and EASY!
- ▶ Helps your organization:
 - ▶ Meet its mission
 - ▶ Survive and thrive
 - ▶ Create lasting, positive change
- ▶ Helps your community:
 - ▶ Solve and avoid problems
 - ▶ Give citizens a voice
 - ▶ Become more just
- ▶ Helps public policy makers:
 - ▶ Get citizen input
 - ▶ Get information on the social needs in their community

Advocacy - Now more than ever

- ▶ A healthy Florida economy must include healthy nonprofits
- ▶ Fundraising and funding remains both the largest concern and a challenge for nonprofit organizations.
- ▶ Unrestricted revenue and cash reserves are not growing
- ▶ The nonprofit sector is affected by inflation and increased costs, just like every other sector
- ▶ At the same time, nonprofits are still seeing an increase in the demand for services and have largely returned to providing pre-pandemic levels of programs and services
- ▶ Human resources - both staff and volunteers - are a concern. Organizations need more of both and to prepare staff to become CEOs

What is Advocacy?

- ▶ Any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others.
- ▶ Includes:
 - ▶ Education
 - ▶ Research
 - ▶ Grassroots organizing
 - ▶ Nonpartisan voter engagement
 - ▶ Litigation
 - ▶ Coalition building
 - ▶ Nonpartisan analysis, study, or research
 - ▶ Requests for technical advice
 - ▶ Self-defense
 - ▶ Lobbying

What is Lobbying? (Federal)

- ▶ Communications that are intended to influence specific legislation (by a legislative body)
- ▶ Specific form of advocacy
- ▶ Two kinds:
 - ▶ **Direct lobbying** - communicating your position on specific legislation to a legislator, government employee, or decision maker who may help develop the legislation, or urging your members to do so. Attempts to influence the public on referenda and ballot initiatives.
 - ▶ **Grassroots lobbying** - communicating your position on specific legislation to the general public and encouraging them to contact representatives in support of or opposition to that legislation. Grassroots lobbying only occurs when an organization reaches beyond its members to mobilize the public.

What is Legislation?

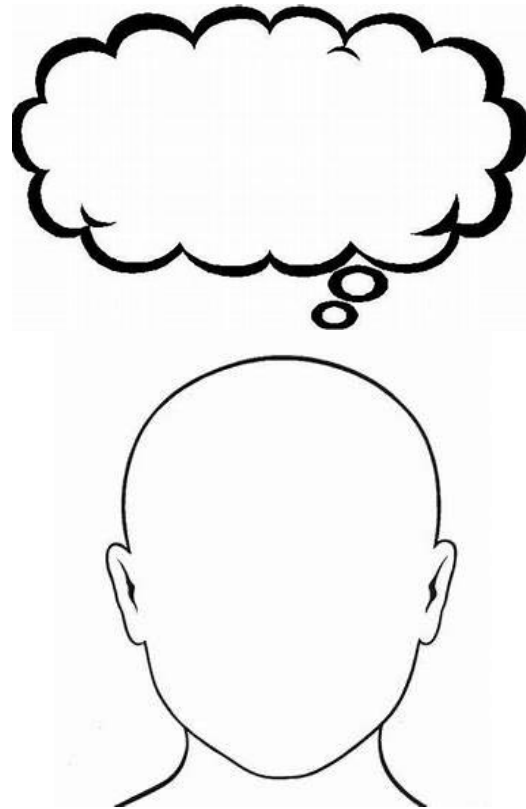
- ▶ Actions by a legislative body, including the “introduction, amendment, enactment, defeat or repeal of Acts, bills, resolutions, or similar items.”
- ▶ Can be federal, state, or local
- ▶ Includes referendum questions, initiative petition, proposed constitutional amendments, Senate confirmation of executive and judicial branch nominees, proposed treaties requiring Senate approval

What is Lobbying? (State)

- ▶ Lobbying is:
 - ▶ Influencing or attempting to influence legislative or executive action; OR
 - ▶ An attempt to obtain the goodwill of a legislator, agency official, or a legislative or executive employee
- ▶ Two kinds:
 - ▶ Legislative branch lobbying
 - ▶ Executive branch lobbying
- ▶ Definitions:
 - ▶ Legislative action: Introduction, testimony, sponsorship or any other official action on any resolution, amendment, appointment or any matter that falls under the purview of either house of the legislature or any committee
 - ▶ Executive action: Action of an agency of the executive branch of state government with respect to a policy or procurement decision
 - ▶ Agency: Governor, cabinet, any department, bureau, board, commission, or authority of the executive branch, and the Constitution Revision Committee

All lobbying is advocacy, but not all
advocacy is lobbying.

Why advocacy for your organization?



Legally Advocating

The background features a complex, abstract design of overlapping teal and light blue geometric shapes, primarily triangles and polygons, creating a modern and professional aesthetic. The shapes are layered, with some appearing more prominent than others, and they extend across the right side and bottom of the frame.

What is Legal

- ▶ 501(c)(3) public charities are allowed to:
 - ▶ Advocate
 - ▶ “Lobby freely” within specified limits -1976 Lobby Law and 1990 IRS Regulation
 - ▶ Influence legislation and ballot initiatives
 - ▶ NOT participate in election or partisan activities
 - ▶ NOT use federal grant funds on lobbying
- ▶ 501(c)(3) Private Foundations are not allowed to lobby
 - ▶ They can build relationships with elected officials, provide technical assistance in response to a written request, and make nonpartisan research available
 - ▶ They can grant general support/operating grants to organizations that lobby, as long as the grant is not earmarked for lobbying
- ▶ 501(c)(4), 501(c)(5), 501(c)(6) and 527 organizations
 - ▶ Can participate in electioneering

What Can Public Charities Do?

▶ Unlimited (Advocacy)

- ▶ Communication with judicial or executive branch or administrative agencies
- ▶ Discussion of broad issues that does not refer to specific legislation
- ▶ Providing an opinion on legislation but omitting a call for action
- ▶ Naming legislators in favor of or against an action and omitting a request to contact them
- ▶ Preparing and distributing a nonpartisan analysis of a legislative proposal
- ▶ Testifying for or providing assistance to a legislative committee after a written request
- ▶ Self-defense lobbying where the organization's future is threatened
- ▶ Nonpartisan voter education, candidate forums, and voter registration

▶ Never (Electioneering)

- ▶ Implied or direct endorsement of candidates
- ▶ Rating candidates
- ▶ Forming a Political Action Committee (PAC)
- ▶ Coordinating educational or lobbying activities with a campaign
- ▶ Contributing or soliciting funds for campaigns or candidates

What Can Public Charities Do?

- ▶ Voting-related Activities
 - ▶ Voter registration activities
 - ▶ Get-out-the-vote efforts - **Be Aware**
 - ▶ Voter education activities
 - ▶ Create voter guides on issues
- ▶ Interact with Candidates in Nonpartisan Ways
 - ▶ Attend candidate events
 - ▶ Host candidate forums or town halls - **Be Aware**
 - ▶ Host all candidates in a race at your organization/event
 - ▶ Share policy or research with all candidates equally
- ▶ Take a position on ballot measures or referenda

What Can Public Charities Do?

- ▶ Limited (Lobbying)
 - ▶ Direct
 - ▶ Grassroots

Legal Limits

- ▶ 501(c)(3) public charities are allowed to lobby
 - ▶ “Insubstantial part test” - “no substantial part of a charity’s activities...be carrying on propaganda or otherwise attempting to influence legislation.”
 - ▶ Is not limited to dollar amounts spent.
 - ▶ Could include organization’s goals and success in achieving them, time and energy devoted to legislative matters by staff and Board, and costs, among others
 - ▶ Generally understood to be 3-5% of annual expenditures, but this number is not stated by the IRS
 - ▶ Section 501(h) expenditure test - Sets specific dollar limits, calculated as a percentage of a charity’s total exempt purpose expenditures.
 - ▶ Must file an election.
 - ▶ Total lobbying expenditures limit = 20% of the first \$500,000 of exempt purpose expenditures + 15% of the next \$500,000 of exempt purpose expenditures + 10% of the third \$500,000 of exempt purpose expenditures + 5% of the remaining exempt purpose expenditures
 - ▶ No greater than \$1M
 - ▶ Grassroots lobbying expenditures limit - 25% of total lobbying expenditures limit

Sample Lobbying Expenditure Chart

Exempt Purposes Expenditures	Total Lobbying Limit	Grassroots Lobbying
\$100,000	\$20,000	\$5,000
\$350,000	\$70,000	\$17,500
\$500,000	\$100,000	\$25,000
\$650,000	\$122,500	\$30,625
\$1,000,000	\$175,000	\$43,750

Effectively Advocating

Internal Preparation

Building an Advocacy Policy Statement

As an organization, you should discuss, decide, and document:

- ▶ Why is advocacy important to your organization?
- ▶ Why is advocacy important for your mission?
- ▶ What criteria will you use to decide whether or not to get involved/take a position? Who decides?
- ▶ What expectations do you have for people advocating on your behalf?
- ▶ How will you proactively monitor relevant legislation?
- ▶ What will you not do?

- ▶ Samples:
 - ▶ [CLPI Road Map to Advocacy](#)
 - ▶ [The Arc](#)
 - ▶ [FNA](#)
 - ▶ [Australian Red Cross](#)

ISSUE

People with IDD often do not have access to the supports or opportunities they need to exercise their civil and human rights due to ableism and social, systemic, and institutional discrimination. Strong advocacy is necessary to support the full inclusion and participation of people with IDD in the community. Effective advocacy is also required to prevent and address abuse, neglect, discrimination, implicit and explicit bias, and any exploitation that people with IDD may experience.

POSITION

To achieve their goals, advocates must be able to interact directly with those responsible for policies and practices that affect their lives, including public officials, private and government funded support system leaders, other advocates, business leaders, and the general public. Self-advocates are people with lived experiences as people with IDD. Advocacy efforts should be led by self-advocates, sharing their stories, views, and expressed interests. Organizational advocacy efforts must be inclusive and accessible to all, regardless of age, gender identity and expression, race and ethnicity, sexual orientation and sexuality, communication and expression, culture, faith or religion, location, economic status, immigration and legal residency status, familial status, support need, or disability.

Advocates include individuals with and without IDD, family members, groups, and organizations that promote the human rights of people with IDD and support their full inclusion in the community. It is important that:

- Advocates have tools and information to understand political, legal, and disability services

Your Advocacy Team

- ▶ Your mission
- ▶ Your utmost integrity and reputation
- ▶ Executive Director and Board - decision makers
- ▶ Staff
- ▶ Board members
- ▶ Volunteers
- ▶ Clients
- ▶ Donors
- ▶ Partner organizations
- ▶ Anyone who cares about your mission

Board Buy-in

- ▶ Make sure your Board understands the laws
- ▶ Lead the Board in discussions on why advocacy is important for your organization
- ▶ Three critical Board roles:
 - ▶ Strategy
 - ▶ Budget and Resources
 - ▶ Personal Engagement

Types of Issues

Mission Area/Org	To Involve or Not Involve?
Legal Aid*	<ul style="list-style-type: none">• Student loan forgiveness• Investment in Public Defender system• “Defunding the Police”
Prevention of Homelessness*	<ul style="list-style-type: none">• Affordable housing investments• Addiction recovery funding• Universal Pre-K
Art Museum*	<ul style="list-style-type: none">• ½ cent sales tax increase for public education• Arts funding
Florida Nonprofit Alliance	<ul style="list-style-type: none">• Property tax assessments• Volunteerism in Florida• Environmental protections

**These are examples only and should not be taken as actual policy agendas for any one organization*

Resource Your Advocacy Work

- ▶ Financial
- ▶ Staff
- ▶ Board
- ▶ Outside resources
- ▶ Thought leadership

Prep Your Messaging

- ▶ Economic impact
 - ▶ Highlight the jobs within your county for nonprofit sector
 - ▶ Return on Investment - calculate how far you stretch a dollar
- ▶ Local human interest stories
 - ▶ Highlight real families (with permission) that you have been able to impact
 - ▶ Have your clients send notes of appreciation about your work
- ▶ Mission importance
 - ▶ Describe need/issue in a compelling way
 - ▶ How many people utilize this resource

Effectively Advocating

External Relationships

Elected Officials

▶ Short-term

- ▶ Learn about your elected officials and prioritize your outreach - sign up for their communications
- ▶ Introduce your organization
- ▶ Know and respect staffers (Chief of Staff, Legislative Director, Press Secretary, Scheduler, Aide/Assistant)
- ▶ Be a resource/subject matter expert
- ▶ Engage in coalition work

▶ Long-term

- ▶ Stay nonpartisan in practice and appearance
- ▶ Understand motivations of all/your elected officials
- ▶ Build a relationship that does not always involve an ask
- ▶ Find ways to monitor existing and potential legislation
- ▶ Practice pragmatic optimism

Communication with Elected Officials

- ▶ For all communications:
 - ▶ Do your homework
 - ▶ Follow protocol
 - ▶ Keep it simple
 - ▶ Make sure they know that you are a constituent and your position “I support/I do not support” first
 - ▶ Ask for action
 - ▶ Say thank you

Engage Them - Proactively

- ▶ Invite on tours of your facility
- ▶ Invite to meet and greets
- ▶ Provide regular updates
- ▶ Attend town halls
- ▶ Be a resource

Media

- ▶ Short-term
 - ▶ Build your media list - not just traditional outlets
 - ▶ Share information regularly - give first
 - ▶ Be responsive
 - ▶ Begin learning the beats, motivations, and needs of specific journalists
- ▶ Long-term
 - ▶ Build relationships
 - ▶ Give as well as ask
 - ▶ Be an expert resource for journalists

Referenda/Ballot Initiatives

- ▶ Combination of elected official tactics and media tactics
- ▶ The voting public is the decision makers, so efforts are considering direct lobbying
- ▶ May help you connect with individuals or communities you don't normally work with
- ▶ You can:
 - ▶ Make an endorsement
 - ▶ Share your position with the public
 - ▶ Organize volunteers to work on the initiative
 - ▶ Host an educational forum or event
 - ▶ Use the media to share your position
- ▶ Make sure you don't:
 - ▶ Suggest support or opposition for any candidates for public office

Funders

- ▶ Build meaningful, mutually beneficial relationships with your funders
- ▶ Make sure they understand why advocacy is important to your organization
- ▶ Learn about their personal connections to decision makers
- ▶ Include them in calls to action
- ▶ Ask them for specific assistance in your advocacy efforts

Coalition Building

- ▶ Process of organizations forming an alliance or partnering of groups to achieve a common purpose or to engage in joint activity
- ▶ “Social movement for good” - generate policy or cultural change and generate awareness of issues or populations in need

- ▶ Examples:
 - ▶ Developing and implementing a shared policy agenda around a common cause or mission area
 - ▶ Coordinating efforts on a specific issue campaign
 - ▶ Coordinating on services and activities
 - ▶ Knowledge sharing and networking
 - ▶ Providing mutual support
 - ▶ Obtaining funding

Effective advocacy is a marathon,
not a sprint

Questions?

Nonprofit Executive Orders Resources

- ▶ [Federal News 2025 Webpage](#)
- ▶ [What to do when your federal grant is terminated](#)
- ▶ [Share your story if impacted](#)

Research and Advocacy Resources

- ▶ **2025 Policy Agenda**
[Click here](#) to download
- ▶ **2024 Florida Nonprofits Survey**
[Click here](#) to read
- ▶ **Giving in Florida**
[Click here to view](#)
- ▶ **Growing Generosity in Florida**
[Click here to view](#)
- ▶ **Nonprofit Economic Impact Dashboard**
[Click here to view](#)

FNA General Resources

- ▶ **Membership**
- ▶ **General Advocacy Information**
- ▶ **Tools**
- ▶ **Trainings**
 - ▶ **Advocacy 101**
Tuesday, April 8, 2-3:30PM ET
 - ▶ **Hackers, Ransomware, and Data Leaks - Can Your Nonprofit Afford the Risk?**
Tuesday, April 15, 9:30-12 ET
 - ▶ **April Consultant Connection**
Thursday, April 17, 1-2PM ET
 - ▶ **Working in Coalitions**
Tuesday, April 22, 2-3:30PM ET
 - ▶ **Get Your Nonprofit Disaster Ready**
Tuesday, April 29, 9:30-10:30AM ET
 - ▶ Check fnonprofits.org, then News - Community Calendar for future events



Voice of the Sector

ings!

pe you are all healthy and safe. Florida has been in phase 1 of re-opening since April 4th. Many nonprofits never closed their doors during quarantine but are exploring what re-engagement looks like for their clients and their staff.

FLA, in partnership with the Oklahoma Center Center for Nonprofits, has created an [engagement guide](#) to help you make the best decision for your agency and team. We hope this tool is a useful guide for you.

Our team has been hard at work gearing up for our economic impact report and keeping you updated on the latest from Tallahassee and Washington D.C. remember to visit our COVID-19 [resources](#) page to keep up with the latest.

In addition, we have a full calendar of events scheduled over the next month! Check out the full list [here](#) .

If there is anything else that you feel would help, please do not hesitate to reach out. Thank you for all you do for Florida nonprofits.

Sincerely,
Sabeen Perwaiz

HEROES ACT

Speaker Pelosi has released the [Health and Economic Recovery Omnibus and Emergency Solutions Act](#) (HEROES Act). See also this [one-Pager](#) and [Legislation](#).

Newsletters

- ▶ [Sample newsletter](#)
- ▶ Sign up at <https://flnonprofits.org/>



FLORIDA
nonprofit
alliance

Thank you!

flnonprofits.org

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