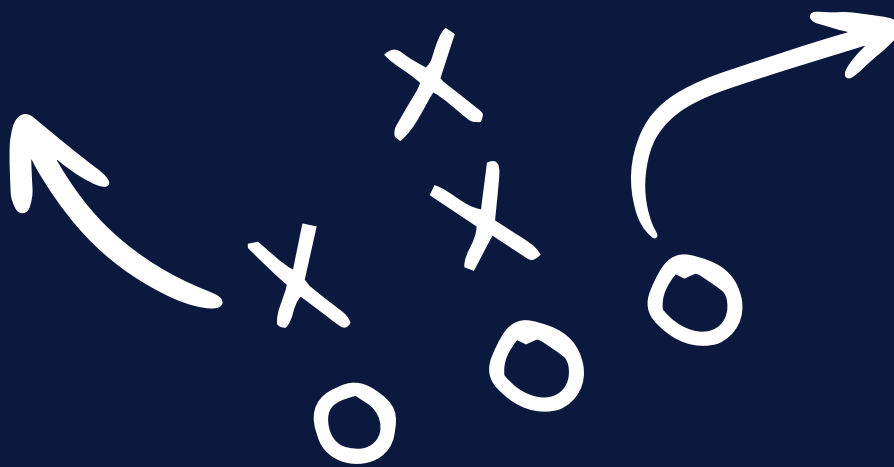


The Nonprofit Voter Engagement **PLAYBOOK**



IT'S ON US

The Nonprofit Voter Empowerment Project



Nonprofit Pledge to protect **EQUAL ACCESS** and
OPPORTUNITY FOR ALL who are Eligible To Vote

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Are you ready to **GET OUT THE VOTE?**

Because nonprofits are among the most trusted [institutions](#) in their communities, it's no secret that our organizations are well-positioned to increase voter turnout, particularly among new voters and voters who face longstanding barriers to casting a ballot. Encouraging voter participation not only empowers communities served by nonprofits, it increases our organizations' impact and ensures elected officials are accountable both during and after an election year.

Nonpartisan voter engagement yields a significant return on investment for individuals and nonprofit organizations alike.

Benefits of voter engagement include:

- [Strengthening trust](#) between nonprofit organizations and the communities we serve
- [Broadening nonprofits' base](#) of potential donors, funders, volunteers, and advocates
- [Building power](#) and electoral accountability during and after an election year
- [Increasing our public policy influence and impact](#) through nonprofit advocacy and civic engagement

Nonprofits aren't the only critical players in this work. In fact, [philanthropy](#) can be a catalyst through increased investment in nonpartisan civic engagement and advocacy. From Census engagement to voting, philanthropy provides critical resources that frontline nonprofits need to help their communities participate in civic and democratic activities. During the 2020 election, foundations engaged in responsive philanthropy by investing additional and flexible funding to address civic needs that were exacerbated during the global pandemic. Many of these needs not only remain but have since been compounded by new policies that seek to undermine, deter, or even criminalize nonpartisan civic activities. Democracy works best when all nonprofits, regardless of mission, work to expand and protect it. As stewards of public trust and philanthropic resources, **It's On Us** to promote civic participation through social innovation.

IF NOT US, WHO? AND IF NOT NOW, WHEN?

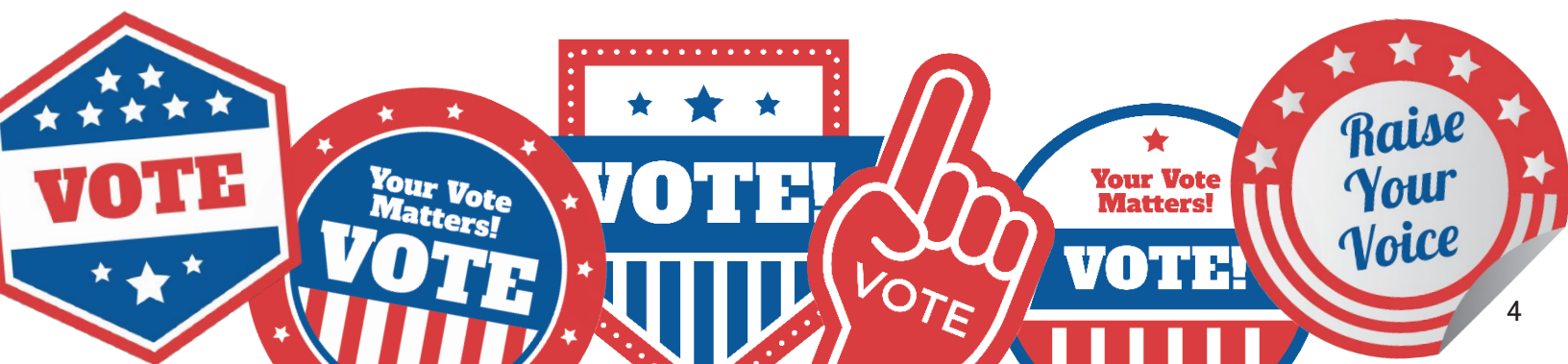
The Answer is Simple: It's On Us



The 2020 election yielded unprecedented levels of voter turnout that helped to reduce participation disparities nationwide. This historic victory was accomplished in the midst of significant uncertainty, including a global pandemic that prompted a series of changes to state and local election laws. Research indicates that voter engagement conducted by [charitable nonprofits](#) made it easier for new and existing voters to navigate a wide range of policy changes and pandemic concerns.

Despite significant progress, nonprofits' work is far from over as many prospective voters continue to struggle with navigating newly enacted policy changes and procedures. These challenges create downstream problems in terms of nonprofit and community voice as candidates and elected officials are more inclined to engage communities with high voter participation rates. Therefore, when the communities we serve are unable to vote, policymakers are less likely to prioritize the needs of nonprofit constituents nor the policy priorities of nonprofit organizations that serve them. Without a concerted effort to increase voter turnout, we face the grim prospect of people in our communities losing their voices, and nonprofits losing their policy influence, donors, and volunteers.

Action is needed. If not the nonprofit sector, who will step in to help? If not now, when is a more appropriate time to protect our communities and missions? **It's On Us** to protect our missions by ensuring that every eligible voter, regardless of political affiliation, can cast their ballot and by rising to the challenge again, nonprofits can protect the civic gains we worked tirelessly for years to achieve.



The Nonprofit Voter Empowerment Project

Nonprofits' ability to advance our missions hinges upon our constituents' ability to cast their ballot in every election.

A NONPARTISAN INITIATIVE CREATED BY NONPROFITS FOR NONPROFITS

The [Nonprofit Voter Empowerment Project](#) is a nonpartisan initiative by nonprofits and philanthropy to help our staff, grantees, volunteers, and constituents vote. There is strength in numbers! By working together to develop an informed electorate, the nonprofit sector can further our missions and create communities where all people thrive.

[Complete your nonprofit's voter engagement plan today](#) to ramp up your organization's nonpartisan voter engagement efforts to meet increasing needs in the future.

IT'S ON US

Join a growing list of nonprofits across the nation who are committed to advancing their individual missions and the sector's collective impact by helping their constituents and staff cast their ballots.

The Nonprofit Voter Engagement Playbook is designed to support the development and implementation of voter engagement and advocacy strategies that can be tailored to meet the unique needs of every nonprofit, regardless of experience, expertise, or organizational capacity. Use the enclosed recommendations and best practices to strengthen your nonprofit's voter engagement efforts. Share the Nonprofit Voter Engagement Playbook with other organizations in your network to inspire action.



Nonprofit Service Area

Please indicate the geographical area(s) your organization serves.

Select all that apply:

- International
- National
- Regional
- State
- Local
- Other: _____

Organization Size & Operating Budget

Which of the following best describes your organization's size?

- Small Nonprofit or Foundation** (nonprofits with annual revenue under \$1 million or foundation with annual grantmaking of under \$1 million)
- Medium Nonprofit or Foundation** (nonprofit with annual revenue \$1 million–\$9.9 million or foundation with annual grantmaking \$1 million–\$9.9 million)
- Large Nonprofit or Foundation** (nonprofit with annual revenue \$10 million–\$49.9 million or foundation with annual grantmaking \$10 million–\$49.9 million)
- Extra Large Nonprofit or Foundation** (nonprofit with annual revenue \$50 million and over or foundation with annual grantmaking \$50 million and over)
- Other

Population(s) Served

Which of the following best describes the constituents your nonprofit serves?

- BIPOC (Black, Indigenous, and/or People of Color) Individuals
- Individuals with Disabilities
- Individuals Who Identify as LGBTQ+
- Women
- Individuals Under the Age of 18
- Senior Citizens
- Persons living in poverty
- Unhoused Individuals
- Rural Constituents
- Faith -Based Communities
- Military Veterans
- Caregivers
- Institution-Serving Organization
- Other Underserved Group and/or Population: _____

Organization Benefits

Does your nonprofit enjoy any of the following benefits?

Select all that apply:

- Healthcare Benefits
 - Retirement Benefits
 - Unemployment Benefits
 - Tax Credits and/or Benefits
 - Other:
-

Political Activity

Does your organization engage in any of the following activities?

- Release research reports to the media, public, or policymakers
- Discuss obtaining grants or contracts with government officials
- Testify at legislative or administrative hearings
- Lobby on behalf of or against a proposed bill or other policy proposal
- Encourage members to write, call, fax, or email policymakers
- Interact socially with government officials
- Work in a planning or advisory group that includes government officials
- Meet with government officials about the work you are doing
- Respond to requests for information from those in government

Nonprofit Workforce

Which of the following comprise your nonprofit's workforce?

- Full-time and/or part-time employees
 - Independent Contractors
 - Volunteers
 - Other:
-

Funding and Operations

Has your nonprofit received any of the following?

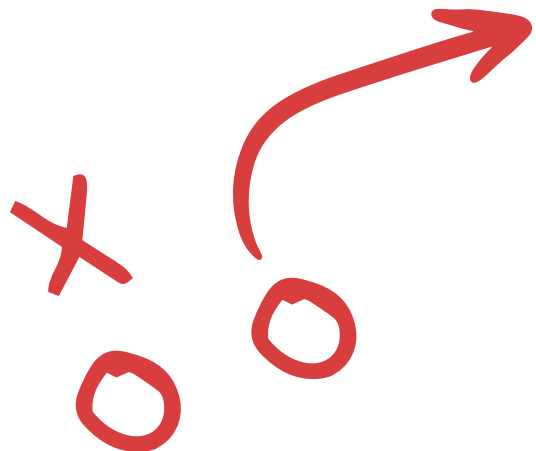
Select all that apply:

- Government Contracts and/or Loans
- Earmarked Grants
- Charitable Donations

Organization Type

Which of the following describes your organization's IRS designation?

- 501(c)(1)
- 501(c)(2)
- 501(c)(3)
- 501(c)(4)
- 501(c)(5)
- 501(c)(6)
- 501(c)(7)
- 501(c)(8)
- 501(c)(9)
- 501(c)(10)
- Other:



A Healthy Democracy Requires Equal Access and Participation



Nonprofit Voice in Elections

Elections provide nonprofits a window of opportunity when elected officials and candidates are listening to the needs of voters and their communities. Ensuring your donors, volunteers, and the people you serve can educate candidates and policymakers about their needs and desires is fundamental to advancing missions and building healthy communities. Ultimately, when candidates know nonprofit staff, volunteers, donors, and the communities we serve vote, candidates know they will be held accountable by these citizens in the next election.

Often citizens require help to ensure their voices are heard by candidates. They need information on voter registration, polling places, and how issues discussed in elections may impact their lives. As nonprofits work to help citizens navigate new policies and procedures they also serve as important nonpartisan experts with valuable information for policymakers and election officials on ways to improve the electoral process to meet the needs of all local citizens.

When trusted organizations use their voice to inform fair, accessible voting policy on behalf of the people they serve, the conversation shifts from a partisan debate to identifying solutions that work for everyone.

The enclosed resources can help you meet the needs of voters in your community in the following key areas:

- [Ensuring Nonprofit Staff Can Vote and Volunteer](#)
- [Improving Accessibility for Voters in Underserved Communities](#)
- [Registering Voters in Communities Served by Nonprofits](#)
- [Educating Voters in Communities Served by Nonprofits](#)
- [Helping the Constituents You Serve Vote Early and Vote-by-Mail](#)
- [Developing a Post-Election Engagement Plan](#)
- [Engaging in Nonprofit Advocacy](#)



**LET'S GET
STARTED!**

Customize Your Nonprofit Voter Engagement Plan

The following templates, activities, and initiatives can be used to support your organization’s efforts to engage voters both during and between election cycles.



Making the Case for Nonprofit Voter Engagement

The following questions can help determine the important “who, what, when, where, and why” questions your nonprofit may encounter when building any plan or timeline of engagement.

How will you get buy-in from organizational leadership for voter engagement?

Connect the dots during a...



Team Meeting	Staff Meeting	Senior Leadership Meeting	Board/Governance Meeting
How will voter engagement programming scale your department’s work?	How will voter engagement work support programming and priorities across the organization?	How will voter engagement programming support your organization’s values and further your mission?	How will voter engagement work benefit your nonprofit’s bottom line? What returns will be gained from investing in nonprofit voter engagement programming?

Assessing Organizational Capacity

What resources does your nonprofit have to support voter engagement programming? How can your nonprofit acquire or allocate resources to support voter engagement programming during the upcoming election cycle?

The following questions will help you understand and potentially expand your organization's capacity to participate in nonpartisan voter engagement work.

1. What existing financial resources can be used to support voter engagement work?

2. What organizational infrastructure can be used to support nonprofit voter engagement work? (e.g., communications platforms, marketing vehicles, platforms to support in-person and virtual engagement, etc.)

Which departments can involve and motivate other staff members and volunteers?

Who in the community you serve can you involve in developing and implementing plans?

Which community partners can you engage in this work and what assistance can they provide?

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Knowledge and Rules for Nonprofit Voter Engagement

Nonprofit organizations, classified as 501(c)(3) public charities, can and should conduct nonpartisan voter engagement activities without jeopardizing their tax-exempt status. The following checklist will help ensure that your staff, volunteers, and initiatives outlined in your nonprofit's voter engagement plan are within the parameters of permissible activities. Additional information surrounding permissible electoral activities can be accessed [here](#).

- ✓ [Election Dos and Don'ts for Public Charities](#)
- ✓ [Election Dos and Don'ts for Private Foundations](#)
- ✓ [Election Dos and Don'ts for 501\(c\)\(3\) Staff](#)

Establish A Voter Engagement Timeline

What are the major [dates and deadlines](#) for the upcoming election?

TIP: State and local election systems can be a daunting prospect, but it isn't difficult once you have a basic understanding of the people who make it work. Develop a rapport with your state and local elections administrators.

Election	Early Voting Period	Election Day	Registration Deadline	Mail -In Ballot Request Deadline	Mail-In Ballot Return Deadline
Primary					
Runoff/ Special					
General					

Selecting Nonprofit Voter Engagement Activities & Initiatives

There are several ways your nonprofit can engage voters, and many of them won't require large commitments from your staff. The following questions and resources will help you determine which nonpartisan **forms of engagement** are best suited for your nonprofit.

1. Who are your target audiences – members, constituents, staff?

2. What challenges impact your audiences' ability to vote [i.e. logistical challenges casting a ballot, lack of knowledge about issues, etc.]?

3. What unique value-add or service can your nonprofit offer to create the motivation and ability of your target audiences to vote?



Voter Education

In the months leading up to an election, the general public and prospective voters will be paying more attention to public policy. Nonprofits can leverage this timeframe to educate voters about policy issues important to their organization's mission and community they serve. As experts on key policy issues that may be debated by candidates, nonprofits have the opportunity to provide trusted, nonpartisan information. Organizations can also include questions about nonprofit policy issues in nonpartisan candidate forums or debates. These conversations not only help raise public awareness about nonprofit policy issues, but also help prospective voters better understand how issues debated during elections may impact their lives, thus increasing their motivation to vote. The key is for 501(c)(3) organizations to focus on educating voters about issues on the nonprofit's policy agenda, rather than the candidates' views about that agenda.

In addition to educating prospective voters on your organization's issues, nonprofits have an important role to play in educating citizens about the voting process and their rights as voters. Many voters may be unaware of new policies that have been implemented since the last time they voted, such as which supporting documents are required to vote, eligible forms of voter identification, the type of machines they will be using to vote, and their rights when they get to their polling station. Nonprofit organizations can take a leading role in providing voters with logistical information about voting with the following activities:

- Provide voter registration deadlines, election dates, and state election office contact information
- Remind voters what documents are permissible and required and their rights as voters
- Post sample ballots prior to the election and show voters how to use a voting machine
- Encourage your constituents to volunteer at the polls during the early voting period and on election day
- Provide voters with basic information on new election policies that have been implemented since the last time they voted



Voter Education Initiatives

CATEGORY	What activity or initiative will you use to support your efforts?	What goals and objectives do you wish to achieve?	How many activities and initiatives will be implemented?	What resources are required to support the specified activity?	When and where will the activity take place?
Absentee & Early Voting Policies					
Election Dates & Deadlines					
Ballot Initiatives					
Voter ID Policies					
Issue Advocacy					
Polling Places					
Nonpartisan Voter Guide					
Candidate Forums					

Voter Mobilization

Nonprofits help individuals in their communities use their own voice in an election year as advocates and voters. Voter registration is only the first step. Ultimately, their voices will only be heard if they vote on election day.

Personal Contact: Any type of personal contact with a trusted messenger close to the election increases a person's likelihood to vote. In person or the phone is best, but a personalized email, social post, or mail helps, as well.

Knowing What's at Stake: Voters can likely be motivated through awareness about the potential impact of a contested candidate race or ballot measure.

Making Voting Easier: New voters can benefit from any message or assistance that makes it easier to vote. Finding a polling site or early voting location. Getting translation assistance. Seeing a sample ballot. Having a plan of when they're going to vote and how to get there if voting in-person.

Mobilization Tactics for Nonprofits

FOR STAFF

- Include personal messages in internal communications with staff that include important election dates and information
- Have CEO/President send an email reminding staff of time-off-to-vote policies
- Conduct a staff education activity on a ballot measure or the election's potential impact on the community you serve

FOR CONSTITUENTS

- Email election reminders: two weeks out, one week out, and the day before.
- Create a flyer with basic voting information and distribute it at the front desk or during staff-client interactions.
- Recruit youth to lead activities. People respond to young people asking them to vote.
- Create visibility: In the final week, use announcements at meetings, events, and on message boards to create election awareness.
- Organize a phone bank to make reminder calls for people your organization helped register.
- The day before the election, ask people where they plan to vote and help find polling places, if needed.

Additional resources surrounding voter mobilization can be accessed [here](#).

Voter Mobilization Initiatives

CATEGORY	What activity or initiative will you use to support your efforts?	What goals and objectives do you wish to achieve?	How many activities and initiatives will be implemented?	What resources are required to support the specified activity?	When and where will the activity take place?
Electoral Volunteerism					
Election Protection					
Constituent Outreach					
Strategic Messaging					



Voter Registration

National Voter Registration Day (NVRD) is a nonpartisan **civic holiday** that is recognized annually every September to celebrate our democracy and our collective efforts to address barriers that prevent eligible voters from making their voices heard. Since its inception, NVRD has helped to register millions of voters across all 50 states. By **leveraging social media**, nonprofits have the ability to educate Americans about how to register, sign up for election reminders, request mail-in ballots, learn about early voting options, and more.

One of the easiest and most effective activities a nonprofit can engage in is encouraging its staff, board members, volunteers, supporters, and service recipients to register to vote. Bear the following guidelines in mind when **preparing voter registration activities**:

- 501(c)(3) public charities and private foundations can conduct voter registration drives and other voter education efforts to ensure more citizens can vote. The only restriction on such activities is that they must be nonpartisan – intended to promote the voting process rather than to influence the election or defeat of a specific candidate or political party. Give registration assistance without inquiring how the recipient plans to vote or suggesting a preference for a political party.
- Remind nonprofit staff and volunteers to help registered voters without saying or writing anything that would indicate any partisan purpose, motive, or hoped-for result.
- Nonprofit organizations can target specific communities of people, as long as those communities are not chosen based on political or ideological criteria. Nonpartisan voter registration should not be designed to influence the outcome of an election.
- The Federal Elections Commission requires posting a sign or giving written notice to people you are registering or helping to vote that says: “These voter registration services are available without regard to the voter’s political preference. Information and other assistance regarding registering or voting, including transportation and other services offered, shall not be withheld or refused based on the support for or opposition to particular candidates or a particular party.”

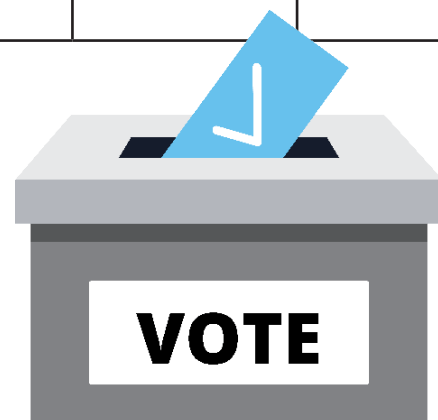
Voter registration activities that may be carried out by 501(c)(3) nonprofits include:

- Registering board, staff, and volunteers to vote
- Registering clients and constituents
- Providing registration materials at events and posting a registration link on the organization’s website

Voter Registration Initiatives

CATEGORY	What activity or initiative will you use to support your efforts?	What goals and objectives do you wish to achieve?	How many activities and initiatives will be implemented?	What resources are required to support the specified activity?	When and where will the activity take place?
Voter Registration Status					
Voter Registration Deadlines					
How to Register					

Your voice **MATTERS.**



What is advocacy?

Effective advocacy enables nonprofits to shape the public debate on important social issues and ensure that underserved communities have a voice in the policies that impact their lives.

The term “advocacy” encompasses a broad range of activities that can influence public policy (including research, public education, lobbying, and voter education). Advocacy is one of the best ways nonprofits can advance the issues they care about and help bring about systemic, lasting change.

How is advocacy different from lobbying?

Lobbying is only one type of advocacy. As such, there are many avenues of advocacy that nonprofits can engage in that do not constitute lobbying, like attempting to influence regulations or challenging laws via litigation. Federal tax law makes clear that lobbying is specific to attempts to influence legislation. On the other hand, “non-lobbying advocacy” is often used to refer to those activities that don’t meet the definition of lobbying because they don’t involve the making of legislative recommendations.

What kinds of activities comprise advocacy work?

- **Organize.** Build power at the base. Your organization could organize a rally, townhall, or similar event to mobilize community members to speak up and advocate for causes important to your mission.
- **Educate Legislators.** Provide legislators with information on issues of importance to your organization so they can make informed policy decisions.
- **Invite Legislators to Your Facility.** Leave a lasting impression. Invite legislators to visit your facilities because these visits play a critical role in educational and legislative efforts. To avoid lobbying, do not discuss specific legislation.
- **Educate the Public about the Legislative Process.** Introduce communities and constituencies to the legislators who represent them. When community members meet legislators face-to-face and discuss the issues that affect their everyday lives, not only do legislators receive the information they need to represent their communities, but those communities are empowered to invest more heavily in the outcomes of policy debates, giving them a stronger hand in their own future.
- **Research.** Produce relevant resources that reflect the real story of your community and its needs.

- **Regulatory efforts.** Take action at the agency level by influencing rulemaking or regulations.
- **Public education.** Educate the community on the issues that matter most to your organization.
- **Nonpartisan voter education.** Highlight the importance of voting and encourage voter registration. Nonprofits can also educate voters on issues and candidates in a nonpartisan way, and they can provide voters with information about where, when, and how to vote.
- **Educational conferences.** Gather, network, share information, and plan for the future.
- **Training.** Conduct a leadership training to provide individuals with the skills needed to be spokespersons for potential policy reform.
- **Litigation.** Win in court for your cause or your community. Challenge an unconstitutional law.
- **Draft a Petition.** Demand change.
- **Write an Op-Ed.** Share your expertise on an issue and establish your organization as a trusted thought leader.
- **Lobbying.** Advocate for or against specific legislation. 501(c)(3) public charities can engage in a limited, but generous, amount of lobbying.

How can your organization get more involved in advocacy?

- **Educate.** Inform supporters, policymakers, allies, and other interested parties about the current policies and problems affecting your community.
- **Evaluate.** Evaluate your organization's mission and goals and examine whether current programs involve advocacy as a means to address problems or grievances in the community. If not, how could advocacy play a larger role in your organization's programs?
- **Collaborate.** Work in coalitions with groups whose philosophy and goals resonate with yours. Together, pooling staff and resources, all parties involved in a coalition will be better equipped to take on campaigns and work for change.
- **Assess.** Use AFJ's free online Advocacy Capacity Tool to assess your advocacy skills, identify specific gaps and strategic opportunities, and focus resources to strengthen your organization and achieve the best results possible.

Advocating to Improve Voting and Election Policies

Nonprofits and philanthropy collectively [invest thousands of hours and millions of dollars](#) to ensure the voices of all citizens in their communities are heard during elections. This nonprofit work to promote democracy on the frontlines in local communities can be made easier or more difficult by local, state, and federal policy. We can ensure our investment and work have maximum impact by weighing-in on voting and election policies that support our missions and communities.

Because nonprofits provide a trusted, nonpartisan voice that prioritizes communities rather than a political party, their input is incredibly valuable in policy debates that shape the security and accessibility of U.S. elections. Independent Sector encourages nonprofits that participate in nonpartisan civic engagement to advocate by educating policymakers on how proposed voting and election policies impact their communities.

In 2021, Independent Sector [adopted principles](#) to use when taking positions on voting and election policies. The principles support policies that increase voter participation, prevent barriers to voting, preserve trust in the integrity of elections, and clarify nonprofit engagement in elections.

Public Policy Resources to Increase Voter Participation:

- Additional Policies that [Increase Voter Participation](#)
- [Same Day Voter Registration](#) and [Automatic Voter Registration](#)
- [Voting at Home or by Mail](#)
- [Competition and the Electoral College](#)
- [Nonpartisan Redistricting](#) and [Ranked-Choice Voting](#)
- [Voting Rights Restoration](#)



Advocacy Initiatives to Support Voting

CATEGORY	What activity or initiative will you use to support your efforts?	What goals and objectives do you wish to achieve?	How many activities and initiatives will be implemented?	When and where will the activity take place?
Help Your Nonprofit Staff Vote				
Important Reminders				
Transportation				
Ballot Tracking				
Provisional Ballot Policies				
Election Result Resources				
Civic Advocacy				
Post-Election Plan				

Key Nonprofit Voter Engagement Resources

- Independent Sector partnered with Nonprofit VOTE and the Council on Foundations to publish [toolkits](#) designed to help both community and private foundations engage grantees, donors, and communities in new ways to help elevate our democracy and the voices of the people they serve.
- The [Nonprofit Staff Vote](#) campaign is a joint initiative that aims to encourage nonprofit employers to offer employees paid time off to vote on or before Election Day. Join our efforts to ensure nonprofit leaders set an example for all industries.
- At this time, Nonprofit VOTE is offering [virtual trainings](#) and can accommodate any nonprofit of any size.
- Need help developing your voter engagement strategy? Use this resource as a [starting point](#) to ensure your constituents are vote-ready on election day.
- The IRS affirmatively states that 501(c)(3) organizations may conduct voter engagement or connect with candidates on a nonpartisan basis. Learn more about [permissible activities](#).
- The [League of Women Voters](#) website provides tips for successful [voter registration](#) drives.
- This Bolder Advocacy [resource](#) supports nonprofit's efforts to [build accountability strategies](#) into their advocacy initiatives.
- This [resource](#), developed by Bolder Advocacy, is an indispensable guide for foundations in explaining the various roles they can play in the advocacy process. Investing in Change can serve as an in-depth guide to navigating the tax code surrounding support of public charities, or a quick reference guide to answer a specific question.
- Philanthropy, through its words and actions, can either stifle or boost a nonprofit's capacity and interest in engaging communities in voting and democracy. Nonprofit VOTE's [Philanthropy for Voter Engagement Toolkit](#), provides examples and best practices for community and private foundations to support or activate local communities to conduct voter engagement.

This resource was created by [Independent Sector](#) and informed by the work of many nonprofits, including but not limited to [Nonprofit VOTE](#), [National Vote At Home Institute](#), [Bolder Advocacy](#), and the [League of Women and the Voters](#).

