INDEPENDENT SECTOR

Earning Influence

RECOMMENDATIONS TO INCREASE NONPROFIT ADVOCACY AND CIVIC ENGAGEMENT

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Earning Influence: Recommendations to Increase Nonprofit Advocacy and Civic Engagement

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We would also like to thank the authors of *The Retreat of Influence: Exploring the Decline of Nonprofit Advocacy* and *The Pursuit of Influence: Interviews with Nonprofit Leaders About Advocacy*, Dr. Lewis Faulk, Dr. Mirae Kim, Dr. Heather MacIndoe, and Claire Connacher, for their rigorous research that serves as a critical foundation for these recommendations.

We also want to thank the many nonprofit leaders who gave their time to share their feedback on this topic over the past four years.

About Independent Sector:

Independent Sector is the national membership organization that connects, strengthens, and advocates for nonprofits and philanthropies. Together with our member organizations, we drive policies and solutions to strengthen the charitable sector and its impact.

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Letter from the CEO

Dear colleagues,

In 2022, Independent Sector began a **major project** to understand and promote civic engagement and public policy advocacy among nonprofits. It had been more than two decades since the last large-scale research on nonprofit sector advocacy, and our world had changed immeasurably in that time. We find ourselves in a time where collective advocacy is essential, particularly now, when it feels like the sector must defend its values and hold together an already fragile social safety net for the American public. That project led to the 2023 publication of *The Retreat of Influence*, finding that just 31% of nonprofits reported engaging in public policy advocacy and lobbying, as well as the 2024 publication of *The Pursuit of Influence*, which shared the words of nonprofit leaders, including how their missions guide their advocacy and the obstacles to that work.

Now in 2025, we are proud to share the findings and recommendations of our **advisory group on nonprofit advocacy**. This group provided invaluable input on how to turn the findings of Independent Sector-commissioned research into a set of prioritized and actionable steps we might take, together, to increase the percentage of nonprofits engaged in public policy advocacy. The recommendations emerging from that process are contained in this report. Independent Sector is already integrating those recommendations as we build new programming and tools to support nonprofit advocacy.

As we like to say at Independent Sector, "let me double-down" on one important point from above. This work, from the earliest research to the recommendations that follow in this report, was never about producing research for the shelf or a "checklist" of items for Independent Sector to complete. It has always been a call to action for the nonprofit sector.

A charitable sector that informs voters, engages with policymakers, and advocates for public policy change is a charitable sector that can go beyond serving those in need to proactively strengthening communities so there will be fewer people in need. We know that engagement and advocacy require knowledge and resources, and we urge infrastructure organizations, experienced advocates, and funders to consider how they can contribute to building our sector's capacity for advocacy.

Now more than ever, we need every voice sharing ideas, speaking truth, advocating for change, and claiming our collective power. Remember, the changes we seek in the world do not just happen by themselves – they require YOUR voice and actions. We hope to see you at the **Independent Sector National Summit** to discuss how we move forward together as a sector. And we are committed to making sure this report and its outcomes are part of your work for years to come.

Akilah Watkins

Dr. Akilah Watkins
President and CEO
Independent Sector

Our Approach to Reaching These Recommendations

Independent Sector's Nonprofit Advocacy Research Advisory Group was created to advance our goal of empowering nonprofit organizations of all sizes, subsectors, and geographies to engage in advocacy and nonpartisan civic engagement. The group provided guidance on how to turn insights from *The Retreat of Influence* and *The Pursuit of Influence* research reports and feedback from charitable sector stakeholders into practical and actionable recommendations that support nonprofit advocacy and civic engagement efforts.

We intentionally recruited nonprofit leaders and policy professionals who understand the challenges organizations face when engaging in advocacy. To ensure a representative group, we prioritized organizations with strong advocacy programs that also reflected the demographics of groups shown in our research to have low or proportionally low advocacy engagement. For example, since arts and culture organizations typically engage in advocacy at lower rates than other subsectors, we included an arts and culture organization that is active in advocacy. To honor their time and expertise, all group members received an honorarium.

The group met four times: June 2024, September 2024, November 2024, and March 2025. To inform their work, group members were briefed on the research findings from *The Retreat of Influence* and *The Pursuit of Influence*, along with stakeholder input gathered through focus groups (in-person and virtual) and online surveys. Using this information, the group identified and refined a list of 17 potential recommendations for further evaluation.

Group members scored each potential recommendation based on three factors: its ability to address barriers to advocacy, the effort needed to develop it, and the capacity required to implement it. To complement this, a survey was conducted to gather scores from stakeholders across the charitable sector. The group then compared their own scores with those from the broader sector to determine the highest priority recommendations featured in this report.

Additional information is available in the appendix.

Recommendations to Increase Nonprofit Advocacy and Civic Engagement

1. Develop training to help nonprofits adopt and adjust daily practices to influence policy.

A lack of resources and capacity are the main barriers to nonprofit engagement in advocacy (Faulk et al., 2023; MacIndoe et al., 2024). In fact, organizational capacity discourages participation in the policymaking process (Faulk et al., 2023). Fortunately, strategies exist to help nonprofits increase their involvement in advocacy and civic engagement without exponentially increasing their time commitment. Some of these strategies involve incorporating civic engagement into a current workflow, such as including voter registration on an existing intake form. Other strategies leverage the collective power of networks, such as joining coalitions. Nonprofits need training that shares these strategies and more to help them make slight adjustments that have a big impact.

2. Craft best practices for building and maintaining policymaker relationships.

It is critical to develop nonpartisan relationships with politicians, legislative staff, agency workers, and other government officials (MacIndoe et al., 2024). These relationships make it possible for nonprofits to have a voice in decision-making and cultivate funding opportunities (MacIndoe et al., 2024). Many nonprofits strengthen these relationships by involving the communities they serve in the advocacy process. They amplify their clients' voices by facilitating conversations with policymakers, and they educate policymakers by giving them opportunities to hear from those directly affected by policies. Nonprofits need clear best practices on how to foster relationships with policymakers so they can bridge the gap between decision-makers and the communities they serve to increase the impact of their advocacy efforts.

3. Provide resources that simplify language and jargon.

Today, significantly fewer nonprofits know the advocacy activities they are legally allowed to engage in compared to 20 years ago (Faulk et al., 2023). In 2000, over half of 501(c)3 public charities knew they could support or oppose federal legislation, compared to fewer than one-third of nonprofits in 2022 (Faulk et al., 2023). This alarming lack of expertise and understanding of the rules of nonprofit advocacy are persistent barriers to engagement (Faulk et al., 2023; MacIndoe et al., 2024). The complexity of regulations and laws at the federal, state, and local levels discourages participation (MacIndoe et al., 2024). Resources that simplify complex legal language and specialized terminology will help nonprofit organizations more easily understand what they are legally allowed to do.

4. Educate nonprofit leaders and boards on the role of advocacy in mission success.

Mission plays the most important role in determining nonprofit engagement in advocacy (Faulk et al., 2023; MacIndoe et al., 2024). However, many organizations struggle to gain full support for their advocacy work due, in part, to differing understandings of advocacy between staff and board members (MacIndoe et al., 2024). Board support is a pivotal way to overcome barriers to advocacy, especially capacity challenges (MacIndoe et al., 2024). Boards participate in important ways such as strategically advising on the advocacy strategy of an organization and issues to advocate for, developing advocacy staff roles, allowing time for the executive director to engage in advocacy, and engaging directly in advocacy activities themselves. Nonprofit leaders and boards need education that emphasizes the positive impact of advocacy on mission success and the vital role boards play.

5. Expand access to specialized advocacy resources and tools.

Shortages of capacity and resources and a lack of understanding of laws and regulations are continuous barriers to nonprofit advocacy (Faulk et al., 2023; MacIndoe et al., 2024). Unfortunately, it can be cost prohibitive for many nonprofits to address these barriers. To engage in advocacy, resource-strapped nonprofits need access to no- or low-cost training, pro bono legal services, advocacy technology including tools to track legislation or mobilize stakeholders, and specialized expertise such as strategic messaging or policy analysis.

6. Demonstrate how advocacy advances all types of nonprofit missions.

For nonprofits that do not engage in advocacy, the biggest barrier is the perspective that advocacy is not relevant to their mission (Faulk et al., 2023; MacIndoe et al., 2024). Advocacy's role in addressing systemic issues helps advance the work of nonprofits across all mission areas. For example, advocacy for a school lunch program could advance the work of a nonprofit food pantry with a mission to feed hungry families in its community. Nonprofits have specific on-the-ground knowledge that can impact responsive policy outcomes. It's necessary to demonstrate how mission can serve as a "north star" to guide nonprofit advocacy, so more nonprofit organizations share their unique knowledge to the benefit of the communities they serve.

7. Provide increased, flexible funding for advocacy and civic engagement.

Lack of resources and capacity are constant challenges for nonprofit organizations when starting or growing their advocacy efforts (Faulk et al., 2023; MacIndoe et al., 2024). This is especially true for smaller organizations or those facing an increased demand for their services (Faulk et al., 2023). Fortunately, funders can support several interventions that have demonstrated effectiveness, such as full-time advocacy staff positions, coalitions, and advocacy initiatives that engage the communities served by nonprofits. Unless government funding restrictions are changed significantly, providing increased, flexible funding for advocacy and civic engagement is an important role that only philanthropy can play.

Our Commitment and Our Ask of You

Independent Sector believes a healthy nonprofit sector is 1) financially robust, 2) powered by a thriving workforce, 3) trusted, well-governed, and effective, and 4) comprised of **informed and active advocates**, as allowed by law.

We are committed to cultivating informed and active advocates by implementing a subset of these recommendations – delivered by advocacy experts in our field and informed by groundbreaking research – that best align with Independent Sector's unique abilities and role in the nonprofit ecosystem.

This could be leading the creation of best practices, partnering with other organizations to develop resources, spotlighting existing tools and trainings, working with board members to align advocacy efforts with organizational goals and educating them on their unique advocacy role, communicating the value of advocacy in mission success, and advocating for increased, flexible funding.

As we have seen from our first research report, *The Retreat of Influence*, the need to change the trajectory of nonprofit advocacy is real and growing. No one organization will reverse the decline in nonprofit advocacy on its own; this is work that will take all of us. We ask you to join us in making these recommendations a reality.

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- **Do you know of existing tools and resources we should highlight?**

- **Are you interested in partnering with us to create something new?**

- **Is there a way you can promote the work we are engaging in together?**

- **Can you offer discounted tools or services for nonprofits?**

If so, email us at **publicpolicy@independentsector.org**. We want to hear from you!

We offer our thanks once again to the Nonprofit Advocacy Research Advisory Group and to each of you for the work you do and will continue to do.

Appendix

A. Key Findings from *The Retreat of Influence* and *The Pursuit of Influence*

Key Findings from *The Retreat of Influence* (Faulk et al., 2023)

- A significantly lower proportion of nonprofits report advocating or lobbying compared to 20 years ago. Only 31% of nonprofits report engaging in advocacy or lobbying over the last 5 years and only 25% report ever lobbying, which is around a third of the percentage of nonprofits that reported ever having lobbied in 2000 (74%).

- Mission plays the largest role in determining nonprofit advocacy and lobbying. Approximately 70% of policy-engaged nonprofits report their mission encourages their policy engagement. For nonprofits that do not engage in policy, 56% report policy engagement is not applicable to their mission and 18% believe that their mission discourages advocacy.

- Today, significantly fewer nonprofits know advocacy activities they are legally allowed to do compared to 20 years ago. In 2000, over half of 501(c)(3) public charities (54%) knew they could support or oppose federal legislation in the year 2000, compared to fewer than one-third (32%) of nonprofits that are aware of that fact today.

- Although a majority of nonprofits have a diversity, equity, and inclusion (DEI) statement, only 36% of them engage in policy activities to create more equitable systems. However, policy-engaged nonprofits' investment of time and resources in DEI activities is much higher than for non-policy engaged nonprofits.

- Nonprofits that belong to collaborative groups advocate at higher rates than those that are not members. Of nonprofits that belong to local, state, or national coalitions, 57% advocate or lobby, compared to only 12% of nonprofits that do not belong to such coalitions.

- Only 13% of nonprofits conduct nonpartisan activities to help people vote. Among nonprofits that advocate, 1 in 5 provide people with nonpartisan voter information.

Key Findings from *The Pursuit of Influence* (MacIndoe et al., 2024)

How do nonprofits define advocacy?

- For nonprofit leaders, the meaning of advocacy encompasses many aspects of their work, including some that may be inaccurately defined.
- Advocacy is often mission-based and selective.
- Advocacy is using your voice and giving a voice to others.
- Advocacy is accomplished through relationships and coalitions.

What are the greatest barriers to nonprofit engagement in advocacy or policy conversations? How do nonprofits work to overcome them?

- Lack of resources and capacity are the main barriers to nonprofit engagement in advocacy.
- Lack of expertise and an understanding of the rules are also persistent barriers.
- Government inaction and unresponsiveness stymies nonprofit voice in the system.
- Coalitions can help nonprofits overcome some capacity and expertise barriers.
- Board support is an important way to overcome advocacy barriers.

Do nonprofits think the government generally supports their missions? How so?

- Nonprofits associate government support with funding.
- Nonprofits value policy support from government.
- Nonprofits want a seat at the table.
- Building relationships with government is crucial.

How do issues of diversity, equity, and inclusion matter for nonprofit advocacy work?

- In order to advocate for community-specific needs, nonprofit organizations strive for governance that reflects community diversity.
- Advocacy initiatives are more effective when they thoroughly reflect the diverse needs of the community.
- Empowerment through representation is crucial to ensure marginalized and underserved groups' perspectives are included in policy discussions.
- Nonprofits face challenges integrating diversity, equity, and inclusion (DEI) into their advocacy efforts.

How does the current partisan state of American politics in 2024 affect nonprofits?

- Maintaining a bipartisan or nonpartisan stance is a strategic necessity.
- Nonprofits must carefully navigate policy engagement.
- Political dynamics create unpredictability for nonprofits, affecting their operational capabilities.
- The increasingly polarized landscape of American politics may distract nonprofits from their core missions.

B. Approach to Recruiting a Representative Advisory Group

The following organizational demographics are associated with low or proportionally low advocacy engagement and were prioritized in the formation of the advisory group. Multiple organizational demographics can apply to the same organization.

Organizational Demographic	Percent of Advisory Group
Annual budget of less than $500,000	8%
Located in a suburban area/primarily serving suburban communities	25%
Located in a rural area/primarily serving rural communities	17%
Religion subsector	8%
Arts & culture subsector	8%
Education subsector	17%
Human services subsector	25%
Local programmatic focus (as opposed to state or national)	17%
Located in the South Atlantic region[2]	42%
Located in the West North Central region[3]	8%
Located in the East North Central region[4]	25%

In addition to these characteristics, we took organization size, service area, mission area, and communities served into consideration.

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2   Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia

3   Iowa, Kansas, Minnesota, Missouri, North Dakota, Nebraska, South Dakota

4   Illinois, Indiana, Michigan, Ohio, Wisconsin

C. Stakeholder Input Summary

We collected feedback from over 330 stakeholders through focus groups and surveys in 2023, 2024, and 2025.

Focus Groups:

- Two in-person focus group sessions were held at Independent Sector's Upswell Summit in Dallas, Texas, November 15–17, 2023. Focus groups were open to conference attendees. Approximately 50 people attended each focus group.

- Two public-facing virtual focus group sessions were held in 2024. Ninety-six people attended the focus group on April 16 and 86 people attended the focus group on July 18.

Surveys:

- A survey gathering reactions to key findings from *The Retreat of Influence* was administered July 2023 –October 2024 and received 27 responses.

- A survey gathering reactions to key findings from *The Pursuit of Influence* was administered in November 2024 and received three responses.

- A survey gathering scores for the advisory group's potential recommendations was administered in February 2025 and received 27 responses.

D. Full List of Recommendations Identified and Evaluated by the Nonprofit Advocacy Research Advisory Group

Below are all of the potential recommendations identified and evaluated by the advisory group, listed in no particular order.

Final recommendations:

- Develop training to help nonprofits adopt and adjust daily practices to influence policy.

- Craft best practices for building and maintaining policymaker relationships.

- Provide resources that simplify language and jargon.

- Educate nonprofit leaders and boards on the role of advocacy in mission success.

- Expand access to specialized advocacy resources and tools.

- Demonstrate how advocacy advances all types of nonprofit missions.

- Provide increased, flexible funding for advocacy and civic engagement.

Potential recommendations:

- Offer training on policy trends, advocacy strategies, and key issue areas.

- Promote bipartisan and nonpartisan advocacy education and strategies.

- Foster collaboration with influential private-sector partners.

- Provide training on systemic change centered on intersectional equity.

- Prepare nonprofits to collaborate with communities on research and policy solutions.

- Develop strategies and best practices to support coalition advocacy.

- Craft messaging to highlight nonprofits' expertise and impact.

- Facilitate learning on cross-community and interpersonal communication.

- Encourage philanthropic support for advocacy through education campaigns.

- Advocate for legislative changes to clarify lobbying rules for nonprofits.

E. Scoring Methodology

Recommendations were scored on three factors: ability to address barriers to advocacy, the effort needed for development, and the capacity required for implementation.

The ability to address barriers to advocacy was evaluated using the Intervention Value Score (IVS). IVS is a range of 1 to 5 with 1 indicating the least value and 5 indicating the most value.

Value	Intervention Value Score
Most Value	5
Great Value	4
Moderate	3
Minimal	2
Least Value	1

The effort needed for development was evaluated using the Intervention Effort Score (IES). IES is a range of 1 to 5 with 1 indicating significant effort and 5 indicating minimal effort.

Required Effort	Effort Score
Minimum	5
Small	4
Medium	3
Large	2
Significant	1

The capacity required for implementation was evaluated using the Organizational Capacity Score (OCS). OCS is a range of 1 to 5 with 1 indicating substantial organizational capacity needs and 5 indicating minimal organizational capacity needs.

Required Organizational Capacity	Organizational Capacity Score
Minimal	5
Limited	4
Moderate	3
Significant	2
Substantial	1

These scores were used to calculate a single Priority Score (PS). The PS is the total sum of the IVS, IES, and OCS. The PS is a range of 3 to 15 with 3 indicating the lowest priority and 15 indicating the highest priority.

$$PS = IVS + IES + OCS$$

SECTION 6

References

Faulk, L. Kim, M., & MacIndoe, H. (2023). *The Retreat of Influence: Exploring the Decline of Nonprofit Advocacy and Public Engagement.* Independent Sector. **http://www.independentsector.org/nonprofit-advocacy-civic-engagement-research/**

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