



AUGUST ADVOCACY TOOLKIT

Sample Thank You Language

Updated: July 23, 2015

NOT FOR DISTRIBUTION

Though there is no precise script for having a conversation with the elected leader who represents you, these guiding principles and sequence of suggested talking points are meant to help shape your discussion so that it is informative and persuasive for your audience, and productive for you.

Philanthropy in [DISTRICT OR STATE]

Introduction & Opening Points

TIPS

Set expectations. Try to frame the conversation in a focused way that acknowledges your audience and gives them some idea about what you're there to talk about.

A few minutes of research on a Member's website will tell you their priorities and interests. Show them that you're aware of their achievements to increase the likelihood they will hear what you are saying.

Remind again that this is about them, their community and their constituents.

TALKING POINTS

- Thank you for making time to meet with me/us. I/we appreciate the opportunity to talk with you about the work that we do at [NAME OF ORGANIZATION], the positive impact it has on our community and your constituents, and the ways in which public policy can help to strengthen—or weaken—this.
- Because of your important work on [EXAMPLE HERE], and your interest in [EXAMPLE HERE] I know that you understand the critical role that philanthropy plays here in our community.
- Our goal isn't just to have this one meeting, but to create an ongoing dialogue with you and your staff to ensure that the important impacts of philanthropy and charitable giving can continue to grow here in [NAME OF COMMUNITY/LOCATION].
- Our mission is [MISSION HERE].
- Some examples of what we do in the community are [EXAMPLES HERE. WHEN POSSIBLE, THESE EXAMPLES SHOULD INCLUDE DATA – NUMBERS OF PEOPLE HELPED, PERCENTAGES OF POPULATION IMPACTED, PHILANTHROPIC DOLLARS PAID WHERE PUBLIC DOLLARS



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DID NOT EXTEND, ETC. INDIVIDUAL STORIES CAN ALSO HELP TELL A “PERSONAL” STORY OF PHILANTHROPY’S IMPACT]

Set the table. Give them a broad context for why the things you are saying are relevant right now.

- The national economy is on stronger footing today than it has been for some time. But that doesn’t stop the search for new and more public revenue. With federal and state resources still constrained, it is more important than ever that our tax laws enable charitable organizations and foundations to continue strengthening and serving our communities.

Show them your hand. Explain why you are there.

- We are here today to speak with you about the critical role of foundations, like [FOUNDATION NAME], in [COMMUNITY/LOCATION] in light of the ongoing stress caused by decreasing revenue at the federal and state level and cuts in government spending and budgets.
- Philanthropy continues to play a key role in working to fill resource gaps meet community needs by creating jobs, supporting the vulnerable, spurring innovation, and providing more opportunities for people to improve their lives. However, despite the tremendous value and necessity of this work, there are legislative proposals that threaten philanthropic and charitable giving.

“HOME BASE”

General Talking Points to Reinforce

TIPS

Your home base messages provide a “sweet spot” that you can always come back to and repeat. They emphasize a broad shared value – in this case the

TALKING POINTS

- Philanthropy is successful because it is flexible and innovative in how it directs resources to address a whole range of issues and the needs of the people in our community.
- Public policy should support and strengthen philanthropy and the communities it serves, not threaten or weaken it.



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unique role philanthropy plays in communities, the need for smart policy, accountability and transparency.

- To ensure accountability and transparency to the public and its donors, the philanthropic sector is subject to regulation at the state and federal level. And, the National Standards for U.S. Community Foundations® accreditation program provides another layer of self-examination and accountability for community foundations.
- In addition to existing regulation, the charitable sector and organizations like mine meet and exceed expectations of excellence that assure regulators, donors and the public that we are deserving of their trust and investment.

TAX REFORM

Tax Reform Should Facilitate—Not Impede—Philanthropy’s Ability to Serve

TIPS

Deliver your key points.

TALKING POINTS

- Public policy should support and strengthen philanthropy and the communities it serves, not threaten or weaken it.
- Tax reform can have unintended consequences that would impact philanthropy and its role in our community and on your constituents.
- Changes to the tax code can enhance and expand the work we do, and the value we bring to communities. Or, they can constrain or diminish our ability to do our work, and consequently, have harmful effects.

THE CHARITABLE DEDUCTION

Preserve the Full Value of the Charitable Deduction

TIPS

TALKING POINTS



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Emphasize your key points with flat facts.

Be as specific as you can.

Philanthropy is successful because it is flexible and innovative in how it directs resources to address a whole range of issues and the needs of the people in our community.

The charitable deduction acknowledges the charitable value of the gift to the community by creating a tax benefit for making philanthropic contributions.

Our community is stronger because a wide range of organizations, like ours, can use the full value of the charitable deduction to address community issues.

As the charitable sector demonstrates time after time, we are able to be nimble and respond swiftly and effectively to issues that arise. Initiatives that cap or limit the value of the charitable deduction will impair this responsiveness.

- For example, the 2 percent charitable deduction floor proposed in the *Tax Reform Act of 2014*—combined with a drastic reduction in those who itemize their deductions—could cause donations to decline by billions of dollars each year. This would stifle the positive impacts of philanthropy in communities attempting to rebuild following the recession.
- **[AN EXAMPLE HERE OF HOW A FOUNDATION INNOVATES TO USE PHILANTHROPIC DOLLARS TO SOLVE PUBLIC PROBLEMS.]**

COMMUNITY FOUNDATIONS

Preserve the Flexibility of Donor Advised Funds (DAFs)

TIPS

Talk about specific, insider issues like DAFs through their use and value to a community and to donors.

TALKING POINTS

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If questioned about an opposing point of view, don't engage in tit-for-tat debate. Instead acknowledge proposals to make a change and return to emphasizing your key messages.

- Donor advised funds provide a future-focused, philanthropic base of support to communities for finding solutions to the toughest, and sometimes unexpected, issues they face.
- DAFs enable individual donors to support the causes they are passionate about, and community foundations to respond swiftly and effectively to acute community needs *when those needs arise*.
- How do we know DAFs and community foundations are operating with integrity and in compliance with the law? The majority of community foundations participate in the National Standards for U.S. Community Foundations® accreditation program, which provides a robust mechanism for ensuring that these organizations follow regulatory requirements and best practices in the field. **[PROVIDE SOME SPECIFIC EXAMPLES OF HOW STANDARDS BENEFIT YOUR ORGANIZATION & COMMUNITY.]**
- **We strongly support current law which permits community foundations to manage donor advised funds that are used to benefit the community today and for years to come. [INSERT EXAMPLE OF A DAF INTENDED TO BENEFIT FUTURE GRANTEES].**

Extend and Make Permanent the IRA Charitable Rollover

TIPS

Don't feel compelled to engage in a technical discussion with lawmakers who are meeting you for the first time and/or who are unfamiliar with the technical aspects of specific laws.

As part of a follow-up letter, for example, you can address specifics. This helps

TALKING POINTS

- Public policy should support and strengthen philanthropy and the communities it serves, not threaten or weaken it.
- The IRA rollover provision was enacted under the *Pension Protection Act of 2006*. In the first two years the IRA charitable rollover was available, Americans donated more than \$140 million from IRAs to public charities.
- **[INSERT AN EXAMPLE OF HOW ROLLOVER DONATIONS HAVE BENEFITTED YOUR COMMUNITY].**
- But this important provision expires annually. Often referred to as “tax extenders,” there are a collection of temporary provisions—



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strengthen your relationship and also gives them time to get staff support or additional background information.

Ideally, they would ask for your help to better understand.

including the charitable “extenders”—that must be renewed every year. The IRA rollover is one of these provisions.

- Congress must restore it so taxpayers can continue to contribute their rollover dollars to charitable organizations in the 2015 tax year and beyond.
- Even in light of the recent markup by the Senate Finance Committee for a 2-year extension on “tax extenders,” **I/we strongly urge you to support the provisions that were set forth in the *America Gives More Act*—specifically, making permanent the charitable “tax extenders” and simplification of the private foundation excise tax.**

THE PRIVATE FOUNDATION EXCISE TAX

Simplify the Private Foundation Excise Tax

TIPS

TALKING POINTS

- Public policy should support and strengthen philanthropy and the communities it serves, not threaten or weaken it.
- The current excise tax is so complex that it serves as a disincentive for grantmaking in a calendar year - which is particularly devastating when late-year emergencies or disasters occur. **[INSERT AN EXAMPLE OF A CHALLENGE YOU FACE WITH THE CURRENT EXCISE TAX. FOR EXAMPLE, HAVE YOU INCREASED GIVING BECAUSE OF AN EXTRAORDINARY EVENT, SUCH AS HURRICANE KATRINA OR THE HURRICANE IN JOPLIN, MO, CAUSING A HIGHER PAYOUT RATE, AND BEEN PENALIZED WITH A HIGHER EXCISE TAX?]**
- A single rate for all private foundations would greatly simplify compliance and ensure the powerful benefits of philanthropic giving are not hindered by overly burdensome requirements.
- **We urge Congress to support the provision from the *America Gives More Act* that would simplify the excise tax to a flat rate of 1%.**



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CLOSING POINTS

The “Ask”

TIPS

In closing, be clear and concise about what you see as next steps.

Also, be specific about how you will follow-up to stay connected – offer your business card and/or the best means to get in touch. You may be asked specifically what you want the Member to do and you should be prepared to respond.

TALKING POINTS

- Thank you for taking the time to meet with us. It’s important that leaders like you understand what’s at stake.
- We hope to continue this dialogue. We will continue to send you information on these issues as they evolve and we invite you to contact us whenever you have questions or need information.
- With tax reform on the horizon, we welcome you to please consider our foundation, our regional association, and the Council on Foundations as your resources for information on philanthropic organizations, as sounding boards for proposals that could impact us, and as a partner back home.

SPECIFIC “ASK” ITEMS:

- We invite you to visit us to see, firsthand, the impacts of generosity and philanthropy in our community. **[CONSIDER UPCOMING EVENTS OR EXISTING PROGRAMS THAT YOU COULD INVITE YOUR LAWMAKER TO ATTEND.]**
- Even in light of the recent markup by the Senate Finance Committee for a 2-year extension on “tax extenders,” I/we strongly urge you to support the provisions that were set forth in the *America Gives More Act*—specifically, making permanent the charitable “tax extenders” and simplification of the private foundation excise tax.
- Please consider joining the Philanthropy Caucus, which educates members of Congress about the vital role of American philanthropy.