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Thank you for joining us. The webinar will begin shortly!
Sue Santa
Senior Vice President of Public Policy and Legal Affairs, Council on Foundations
Maggie Gunther Osborn
President,
Connecticut Council for Philanthropy
David Thompson
Vice President of Public Policy,
National Council of Nonprofits
Lisa Danielson
Principal and Communications Expert,
*L. Danielson Consulting*
Where Are We Now?

• All Exempt Organizations Tax Issues are being considered within the Lens of Comprehensive Tax Reform

• …Whenever that occurs
Recap

Important Milestones in 2014 - 2015

February 2014
• Former House Ways and Means Chairman Dave Camp (R-MI-4) releases *Tax Reform Act of 2014* discussion draft

July 2014
• *America Gives More Act* (H.R. 4719) passes House on a bipartisan vote of 277 – 130

December 2014
• Chairman Camp introduces the *Supporting America’s Charities Act* (H.R. 5806); it fails to pass the House
• Congress passes tax extender provisions for 1 year, retroactive for 2014, for just 2 weeks
February 2015
• Senate announces Finance Committee tax reform working groups

• House passes *America Gives More Act of 2015* (H.R. 644)

April 2015
• Sen. Schumer reintroduces *Public Good IRA Rollover Act of 2015* (S. 1159) to make permanent and expand the IRA charitable rollover

July 2015
• Senate tax reform working groups release reports, includes reform options impacting charitable organizations
Looking Ahead:

Tax Reform Possibilities
Philanthropy is on the radar

*How Do We Know?*

- President’s Budgets since 2010 (excise tax simplification, cap on charitable deduction)

- Tax extender renewal process and debate (*America Gives More Act, Supporting America’s Charities Act, Public Good IRA Rollover Act*)

- Tax reform proposals we’ve seen so far the past few years, including recent Senate working group activity
Looking Ahead

Senate Tax Reform Working Group Options

• IRA Charitable Rollover – make permanent and consider expanding
• Private Foundation Excise Tax – Simplify to a flat rate
• E-filing of Form 990 – Make mandatory
• Declaratory relief for 501(c)s – Expand
• Food inventory donations deduction – make permanent
• Conservation easement deduction – make permanent
• Contributions of property – look at valuation issues
Maggie Gunther Osborn
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National Council of Nonprofits
August Advocacy Toolkit: What is it?
What are we Trying to Achieve?

We want to create and/or strengthen a personal connection that directly links positive outcomes from your community with your foundation.

• Raise awareness: deliberately include elected officials and other important stakeholders as part of your regular communications and outreach efforts (e.g. newsletter, events, site visits)

• Reflected glory: highlight your work by shining a spotlight on others and the tangible, visible effects of what you do (and/or use facts and figures to illustrate)

• Repeat.
Picture it: Your Role.

- Special Interest
- Constituents
- Caucus
- Media
- Personal

Your Lawmaker
August Advocacy Toolkit

On-hand resource
Specific pieces and their purpose

• Tips & Talkers: helps to plan for and structure your conversation
• FAQ: helps to see what you may be asked and how you can respond
• Sample op-ed: highlights the overarching narrative for public consumption
• Local outreach opportunities: specific ways to consider connecting with your lawmaker
• Local philanthropy: a document that illustrates the flat facts and data that help tell your compelling story
• Sample email/letter: a template to consider customizing for your communications
Repeat. Repeat. Repeat.

Source: Kully Hall Struble
Questions?

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