



COUNCIL *on* FOUNDATIONS

***Washington  
Update***

Tuesday, July 28<sup>th</sup> 2015





# Housekeeping Items

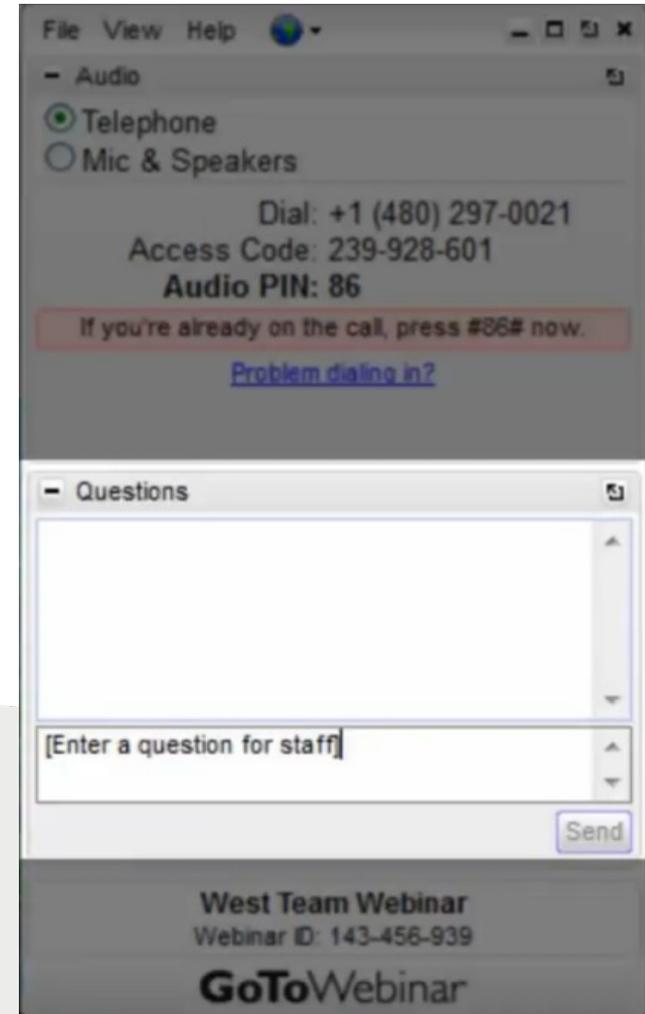
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**Webinar Recording:** A recording of this webinar will be made available upon request shortly after the webinar’s conclusion.



**Thank you for joining us. The webinar will begin shortly!**



# Speakers



## 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*



## 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



## Important Milestones in 2014 - 2015

### 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



## 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

President,  
*Connecticut Council for Philanthropy*





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# **August Advocacy Toolkit:** *What is it?*





# **Lisa Danielson**

*L. Danielson Consulting*





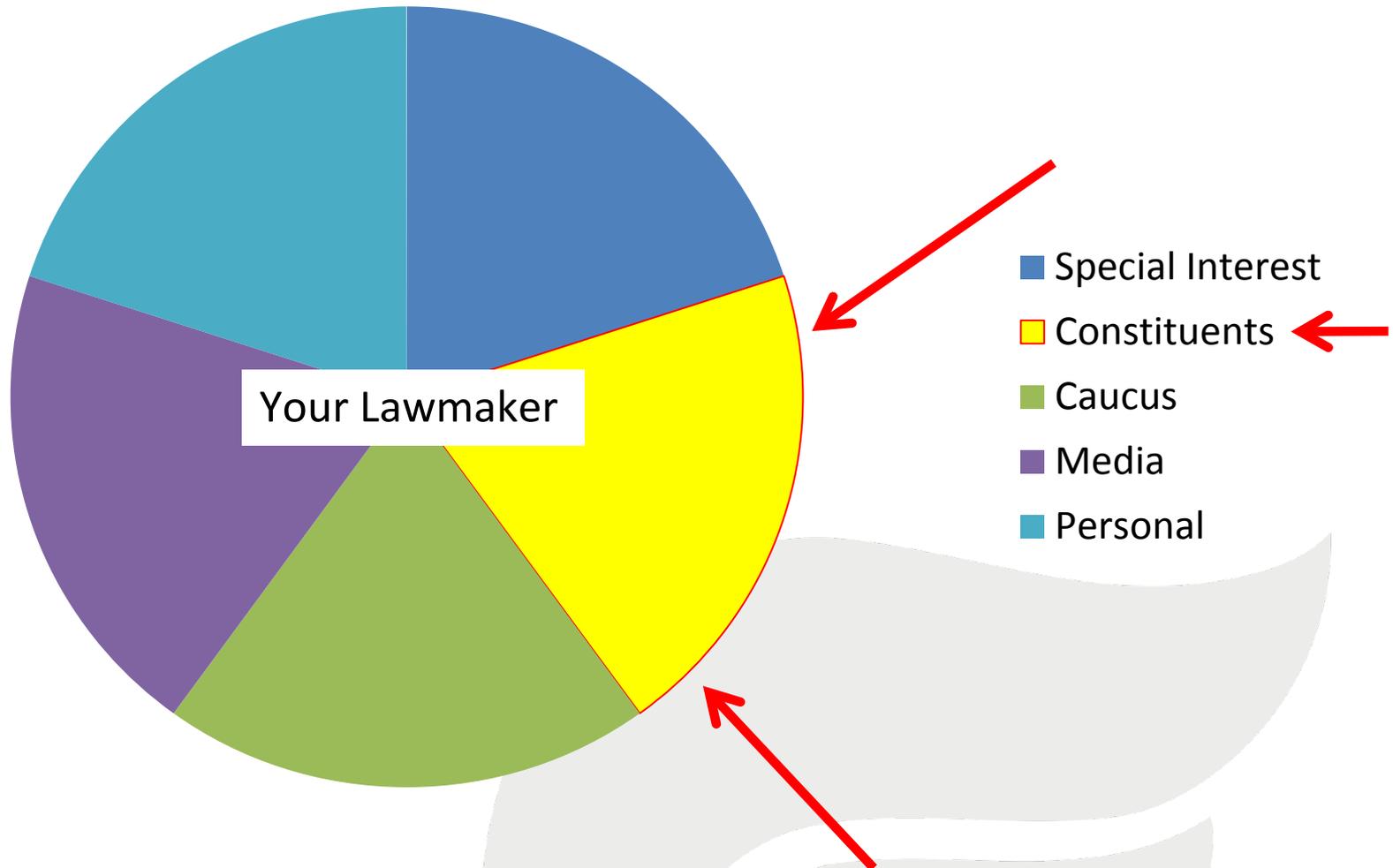
# What are we Trying to Achieve?

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.





# 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?

To sign up for our ***Washington Snapshot*** newsletter,  
e-mail [govt@cof.org](mailto:govt@cof.org)

