



Maine Nonprofit + Funder

Voter Engagement Guide





## Acknowledgments

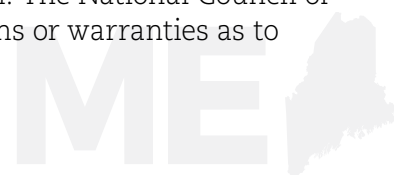
Maine Association of Nonprofits, Maine Philanthropy Center, and The National Council of Nonprofits thanks Nonprofit VOTE for their collaboration and assistance with this National Voter Engagement Guide. Nonprofit VOTE is a nonpartisan organization that provides resources and training to 501(c)(3) nonprofit and charitable organizations on how to conduct nonpartisan voter and civic engagement activities.

### The Word “Nonprofits”

The term “nonprofit” means different things to many different people. It’s a commonly used word, but often without a common understanding. People can use “nonprofit” and “tax exempt” interchangeably. Congress has created almost three dozen types of tax-exempt organizations in different sections of the tax code. Section 501(c)(3) of the tax code refers to “public charities” (also known as charitable nonprofits) and “private foundations.” The tax code considers “churches and religious organizations” (which the IRS defines to include mosques, synagogues, temples, and other houses of worship) to be “public charities.” This Voter Engagement Guide uses the terms “charitable nonprofits” or simply “nonprofits” as shorthand for “501(c)(3) tax exempt organizations other than private foundations,” unless expressly saying otherwise.

### Disclaimer

The content provided in this Voter Engagement Guide is provided in good faith for informational purposes only and is neither intended to be nor should be construed as legal or tax advice. Please consult an attorney for the latest and most accurate information. The National Council of Nonprofits and Maine Association of Nonprofits make no representations or warranties as to the accuracy or timeliness of the information contained herein.



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## Dear Maine Nonprofit Leaders,

We are excited to share with you our Maine Nonprofit & Funder Voter Engagement Toolkit, designed to help your organization play an essential role in advancing voter engagement in Maine. Nonprofits and foundations are uniquely positioned to support and enhance democratic participation through nonpartisan voter engagement activities. This toolkit aims to provide you with the resources and guidance you need to get started!

Nonprofits' impact on voter engagement is significant and proven. Maine nonprofits are trusted messengers within our communities, and their reach extends to almost all Maine people, including and especially those who are historically excluded from the electoral process. According to Nonprofit VOTE, "voters who were engaged by nonprofits about voting were much more likely to cast a ballot than comparable voters – 10 percentage points more likely" overall and even higher in historically underrepresented groups like younger voters, people with low incomes, and people of color.

Maine foundations play a pivotal role in supporting these efforts. By providing early, unrestricted grants and multiyear investments, funders empower nonprofits to dedicate time to building the foundation of public trust necessary for successful civic engagement and get out the vote campaigns. These investments also signal to the broader community that strengthening civic engagement and sustaining our democracy are a priority, and a necessary component of making meaningful community impact.

The involvement of nonprofits and foundations in voter engagement efforts is critical for building a democracy that truly reflects the diverse perspectives and needs of our population. Together, we can amplify our impact, ensure that every eligible voter can vote, and help create a more representative, vibrant, and equitable society - one where policy decisions are made with broader public input and accountability.



Jeannette Andre  
President & CEO of Maine  
Philanthropy Center

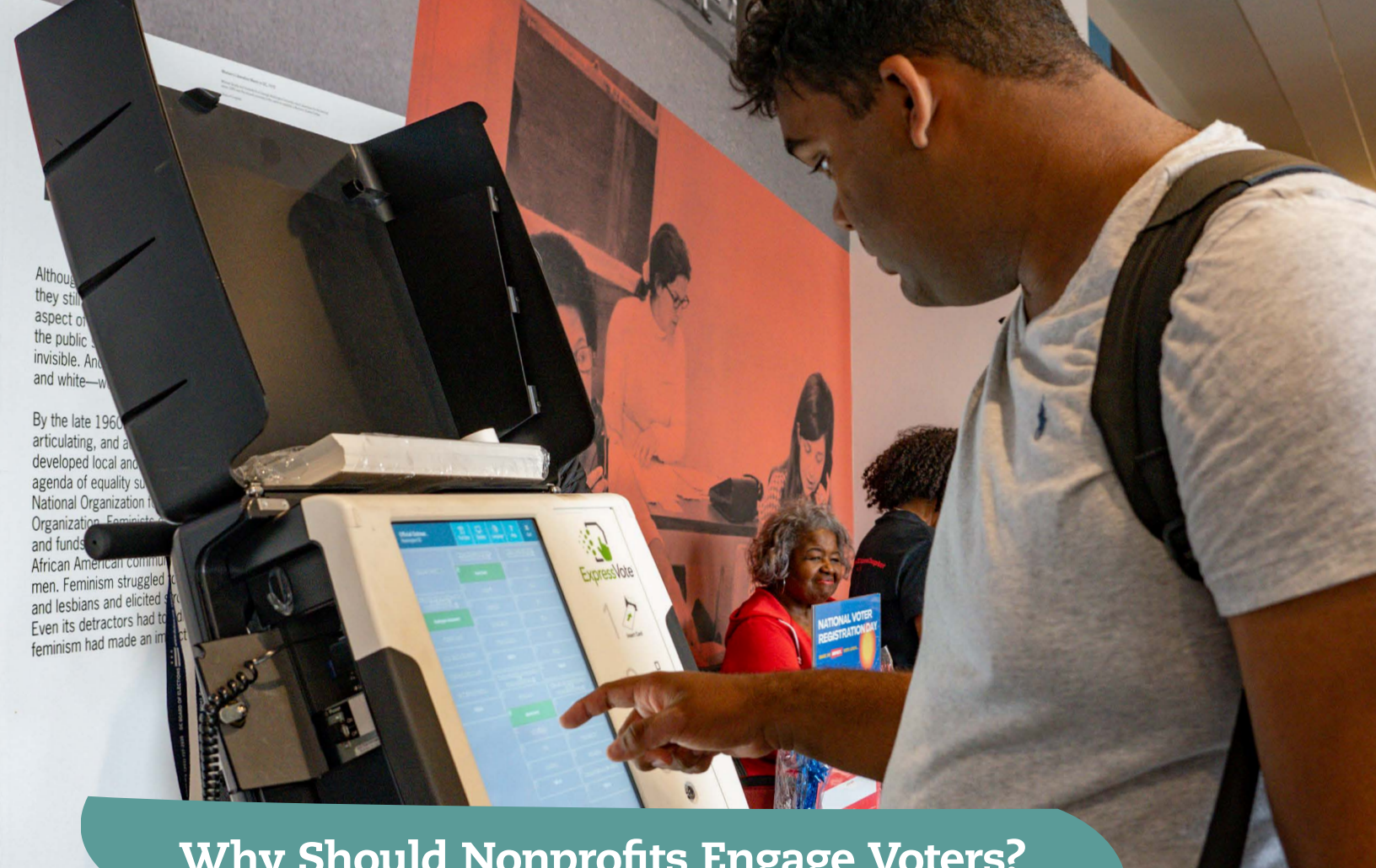
A handwritten signature in black ink, appearing to read "J. Andre".



Jennifer Hutchins  
Executive Director of Maine  
Association of Nonprofits

A handwritten signature in black ink, appearing to read "Jennifer Hutchins".





## Why Should Nonprofits Engage Voters?

Voting is a fundamental pillar of participatory democracy. Every eligible voter should have the opportunity to have their vote count. Active voter participation builds healthier communities. People who vote are more likely to volunteer, advocate, or be civically active in other ways. Elected officials are more likely to respond to the needs and concerns of neighborhoods that turn out on Election Day, and they are more responsive to organizations that promote voting.

Voting is something we can't take for granted. Voters need guidance with many of the following:

- Finding their polling location
- A number to call for assistance
- Learning about their voting options (early, by mail, in person, etc.)
- Understanding what's on the ballot
- The impact of the election on the issues they care about

Nonprofit organizations have a critical role to play in promoting voting as a safe and accessible activity to strengthen our communities.





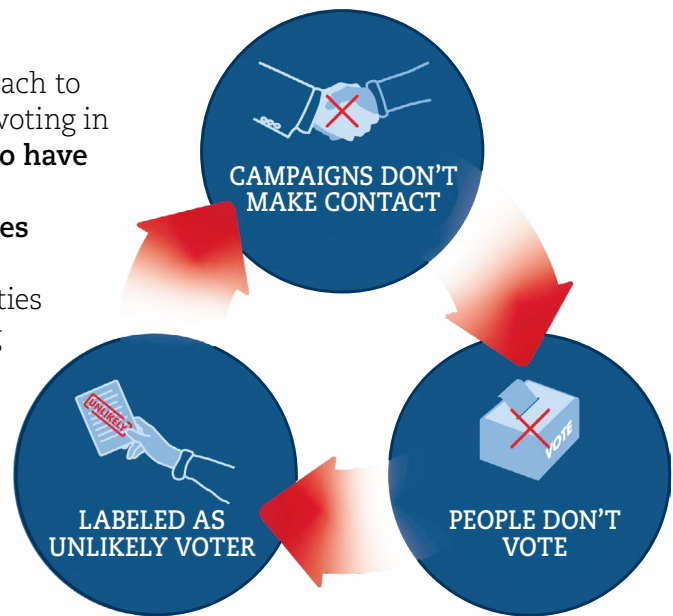
Partisan candidate campaigns only invest in outreach to prospective voters who have a high probability of voting in an upcoming election. **People in communities who have been historically marginalized from the election process are less likely to have long voting histories so campaigns don't see value in reaching them.**

Nonprofits active in those marginalized communities can break the negative feedback loop by registering and turning out new voters so that more of the community is heard by the elected leaders. Through these nonpartisan actions by charitable organizations, the parties and candidates take notice and truly represent them.

### **Our Access and Trust Make Nonprofits Great Messengers**

**Nonprofits are among America's most trusted community institutions**, and as familiar service providers and advocates we have personal relationships with communities that have been traditionally underrepresented in elections and public policy advocacy. Our regular contact during points of service (any interaction between nonprofits and community members) allows us to weave voter engagement into existing programs and services. We have the opportunity to use our trusted roles to become a powerful nonpartisan voice for voter participation and the issues that matter to our communities.

**Learn more at Keeping Our Republic: The Roles of Charitable Nonprofits at <https://www.councilofnonprofits.org/articles/keeping-our-republic-roles-charitable-nonprofits>.**

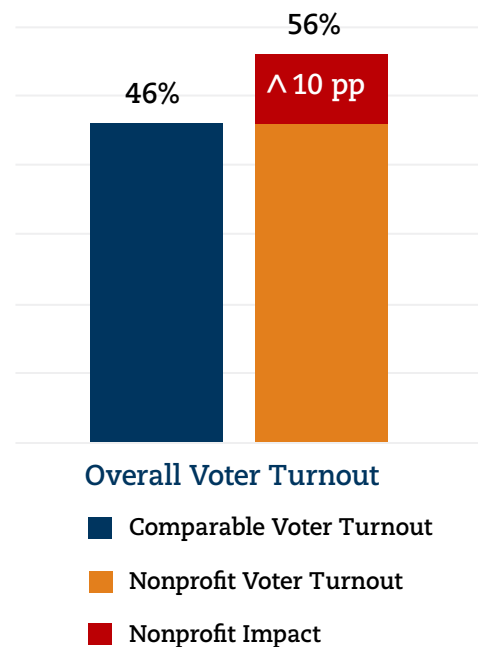




## It Works

According to the 2024 Nonprofit Power report, nonprofit voter engagement disrupts cycles of disengagement and helps close long-standing gaps in turnout. In an analysis of over 7,000 prospective voters in 8 states who were contacted before the 2022 elections by nonprofits and social service agencies, Nonprofit VOTE found that prospective voters who were contacted were 10 percentage points more likely to vote than demographically similar registered voters (56% vs. 46%). Those percentage points increased even more when focusing on underrepresented populations like low-income households, persons of color, and young people. When nonprofits engage prospective voters, we all benefit from a more inclusive and representative democracy.

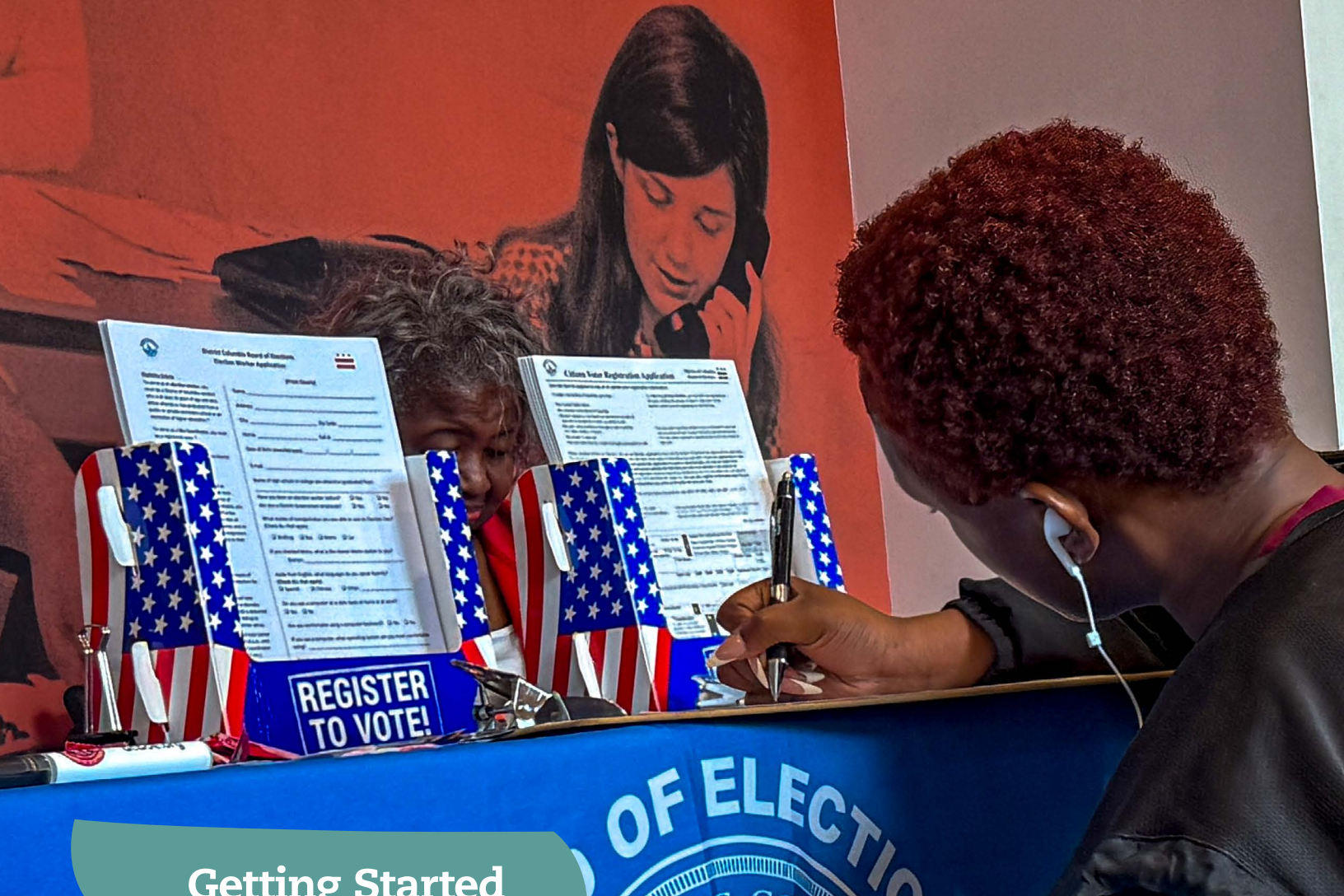
Learn more about the 2024 Nonprofit Power Report at [nonprofitvote.org](https://nonprofitvote.org).



## Key Takeaway

Your nonprofit organization is well-suited to helping people become more active citizens by encouraging voter participation.





## Getting Started

Whether it is your first time engaging potential voters or you are trying to deepen your existing work, this Voter Engagement Guide can support your way to a successful voter engagement initiative.

### Build Buy-In: Before, During, and After

A successful voter engagement plan depends on buy-in from your organization's leadership. Key staff and volunteers are often the point people for designing and executing the plan, but the activities are more likely to be carried out organization-wide with clear and strong support from your nonprofit's leadership.

- ✓ Plan a time to discuss your voter engagement activities with your executive director and ensure you have support from the board.
- ✓ Bring this Voter Engagement Guide to your meeting and describe the activities you think are a good fit for your organization – make sure to specify key points of contact for engagement with your constituents.
- ✓ Highlight why this work is important for both your clients and organization.





## What's Next in This Voter Engagement Guide

### Learn the Rules

**Make sure your efforts are nonpartisan.** That means that none of your communications or activities attempt or even appear to support or oppose any candidate or political party. In addition, make sure you find out about dates and deadlines, eligibility requirements, and the process of voting in your state. It's usually best to go directly to the state or local elections office to get the most accurate and up-to-date information.

### Make a Plan

Mapping out a clear plan for your voter engagement activities can help ensure your efforts are successful. Every organization is different, so it's up to you to decide which activities fit most naturally into your existing programs. **Activities generally fall into three categories: voter registration, voter education, and candidate engagement.** You can mix and match for maximum impact and effectiveness.

### Talk to Potential Voters

Above all, potential voters want a reason to vote. Research demonstrates that people are much more likely to vote when they sense something is at stake. Help potential voters understand that their vote, as well as the votes of their peers and community, will make a difference and have an impact on issues important to them. **Help your staff and constituents make a connection to what's on the ballot and how it can impact their lives.** You can go to your city council, state legislature, or other elected legislative body's website to learn more about policies that are being voted on by the people we elect.





Section 1:

**Learn the Rules**



## A Nonprofit's Guide to Nonpartisanship

In 1954 Congress added a provision to the Internal Revenue Code commonly known as the “Johnson Amendment” requiring 501(c)(3) organizations – charitable nonprofits, private foundations, and religious congregations – to remain nonpartisan regarding elections for public office. They did it to protect charitable nonprofits, houses of worship, and foundations – and the donating public – from partisan election-related activity.

**501(c)(3) charitable nonprofits may not “participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.” I.R.C. 501(c)(3).**

The power of being nonpartisan flows from more than this statute:

1. Nonpartisanship respects the diversity of political opinions among your staff, board, volunteers, donors, and the people you serve. Charitable nonprofits should be focused on advancing our missions and not diverted by partisan politics.
2. It strengthens your ability to advocate for your issues and your community across and without regard to partisan lines. It gives you access to diverse community leaders and funding sources. There is a place for a more partisan approach. That's why Congress created 501(c)(4) social welfare advocacy organizations (and other partisan vehicles) which can do a certain amount of partisan election-related activity, but whose donors don't get a tax deduction.
3. It respects charitable nonprofit leaders as trusted messengers who can engage marginalized populations that campaigns and candidates often miss. Our nonpartisan approach is one reason charitable nonprofits have proven effective at reaching youth, new voters, rural residents, and increasing voting rates across all demographics.

When working on voter engagement, it is important to understand what 501(c)(3) organizations can and cannot do to remain nonpartisan.

**A 501(c)(3) organization may NOT conduct partisan activities to support or oppose any candidate for public office, including:**

- Endorsing a candidate or expressing support or opposition for any candidate or political party (even for nonpartisan offices).
- Making a contribution of any kind to, or expenditure for, a candidate.
- Rating candidates on who is most favorable to your issue(s) or sharing messages or materials that rate or rank candidates.
- Letting candidates use the organization's facilities or resources, unless those resources are made equally available to all candidates at their fair market value.





**Nonpartisan activities 501(c)(3) nonprofits may do to encourage voter participation and promote voter education include:**

- Promote or conduct nonpartisan voter registration in alignment with state law.
- Educate registered voters on a nonpartisan basis on the where, when, and how of voting.
- Encourage and remind people to vote.
- Distribute nonpartisan sample ballots, candidate questionnaires, or voter engagement guides.
- Host or co-sponsor a candidate forum in nonpartisan ways.
- Host or co-sponsor events so people learn about ballot measures (e.g., propositions, referenda, bonds) they will be asked to decide by voting and how the outcomes can affect their lives.
- Educate community members in nonpartisan ways on who the candidates are and what the offices do.
- Encourage staff to serve on Election Day as a poll worker, translator, or other nonpartisan volunteer.
- Continue issue advocacy during an election.
- Support or oppose ballot measures.

## Key Takeaway

While your organization is not allowed to directly or indirectly support any candidate for public office or political party, there are many nonpartisan activities you can undertake to help people vote.





## Digital Communications and Nonpartisanship

Your organization may already be using social media to communicate with supporters and the public, attract new members, mobilize public opinion, and promote civic engagement.

**The prohibition on nonprofits participating in partisan election-related activities is the same for social media as it is for any other type of communication.** You may encourage people to register and vote on a nonpartisan basis, but you may not use social media to indicate support for, or opposition to, candidates for public office.

### Can a Staff Member Use a Personal Account to Support Candidates?

Individuals have a right to express preferences for or against candidates, as long as they are doing so on their own time and using their individual resources. This applies to their personal social media accounts. The exception would be if that account is primarily used by the individual or others as a communication vehicle for the nonprofit.

### What about the Executive Director or CEO?

The chief executive officer of the nonprofit has the same rights of free expression as any other staff member, when not officially representing the organization. However, to the extent they are seen by stakeholders and constituents as representing the nonprofit, a CEO should exercise extra restraint in what they say on the internet to avoid any appearance of partisanship. CEOs should clarify when they are speaking in their own capacity and not as a representative for the organization.

### What are Guidelines for Tagging, Sharing, or Retweeting?

Don't use organizational accounts to tag, re-tweet, or share posts with political campaigns or partisan organizations that have endorsed candidates.

### How About Sharing Content Posted by a 501(c)(4) Advocacy Organization or Other Non-campaign Organization Whose Primary Purpose is Something Other than Electing Candidates?

You may share content if the content shared is educational in nature and clearly nonpartisan. It is always safer to share content, for example, from a state or local government elections office, 501(c)(3) nonprofit, educational source or public media outlet not affiliated with a partisan political campaign.

### Is My Nonprofit Responsible for How Our Posts are Shared?

No. You are not responsible for how and with whom others share your posts.

### What About Content Posted by Other Users to Our Social Media Platforms?

While you can't control what other people post to your wall or tweet at you, you can make a general disclaimer on your social media site that you're not responsible for opinions posted by people not under your employ.



# Finding Your State and Local Election Information

After learning what it means to stay nonpartisan while engaging voters as a 501(c)(3) organization, researching state and local election information is the next step. Every state sets the legal framework for its own elections, so rules and dates will vary. Always confirm your information with a reputable source, like the local election office. If you're unsure whether a website is from an actual governmental office, look for websites that end in ".gov".

Gather the following relevant information before engaging potential voters in your state. We've provided basic information for Maine as of 2026 below:

## How to Register to Vote:

- **Online Voter Registration:** You can [register online](#) up to 21 days before an election.
- **In-person Registration:** You can register at your [town office or city hall](#) at any time, including on Election Day.
- **Register by Mail:** You can register by mail using the [federal form](#) or [state form](#). Must be received at least 21 days before an election.
- **Same Day Registration:** Those who miss the above deadlines can still register in person at their [town office or city hall](#) through Election Day.

## How to Vote Absentee/By Mail:

- Maine does not require an excuse to vote absentee. [Request your ballot online](#) or from your municipal clerk.
- Ballot requests are due by 5:00 p.m. on the third business day before Election Day. After that, voters with a special circumstance can still request one from their clerk.
- Your completed ballot must reach your municipal clerk by 8:00 p.m. on Election Day.
- Return your ballot by mail, at your [municipal clerk's office](#), or at a designated secure drop box. Contact your clerk for drop box locations.

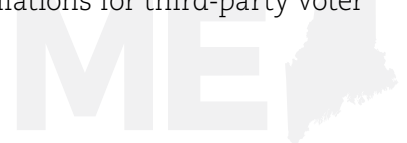
## How to Vote Early:

- Early in-person voting begins at your municipal clerk's office about 30 days before an election and ends the Thursday before Election Day.
- Find your [municipal clerk's office](#) before Election Day and check its hours, which vary by town.

## How to Vote In Person on Election Day:

- [Confirm the election date](#), including primaries and special elections.
- [Find your polling place](#). Polls in Maine open between 6:00 and 10:00 a.m. depending on your town and close at 8:00 p.m.
- Maine does not require identification to vote.

**State rules are subject to change. The above reflects rules in Maine as of 2026.** Find helpful links, including Maine's election website, at [nonprofitvote.org/voting-in-your-state](https://nonprofitvote.org/voting-in-your-state). If you plan to offer help with registering people to vote, review the information on Maine's regulations for third-party voter registration drives on the next page.





## Maine Voter Registration Drive Guide

### Getting Started

Maine does not require training for registration drives, and it has no notification requirements. Do not pay participants based on how many registrations they collect, and do not offer an applicant any incentive of monetary value to register to vote.

### Obtaining Applications

Registration cards are free from the Maine Office of Elections, using the [voter registration card request form](#). Statewide candidates and qualified parties may request up to 2,000 per week and 10,000 per election; other individuals and organizations, 1,000 per week and 5,000 per election.

Anyone may [print additional cards](#) from the current electronic version, but they must be double-sided on 4" x 6" green card stock; see the Secretary of State's [Voter Registration Card Policy](#) for full requirements. The [federal mail-in voter registration application](#) may also be used.

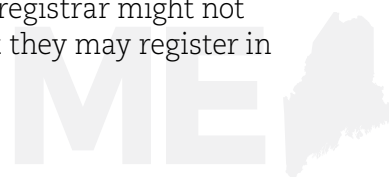
### Handling Applications

Third parties may not distribute or collect voter registration applications inside the voting place or within 250 feet of the entrance. Do not fill in missing information without the applicant's express consent. Under Maine law, a voter's full date of birth and any part of a Social Security, driver's license, or other ID number is highly sensitive personal information and should not be retained.

First-time Maine voters must document their identity and Maine residency. If someone registering by mail or through a third party does not include a photocopy of a qualifying document, an election official will contact them to arrange it. A voter who has not provided proof must still be allowed to cast a challenged ballot. For more information, see the [Maine voting residence fact sheet](#).

Completed applications submitted through a third party must be delivered by 21 days before Election Day, and the Secretary of State recommends getting them to the appropriate municipal registrar as soon as possible. Cards sent to the Secretary of State's office instead must arrive by the 30th day before an election, so the office can forward them to the right registrar. Cards from drives should be bundled and returned with the contact information of the organization or individual conducting the drive.

Anyone registering within 30 days of an election must be told that the registrar might not receive the application before the mail or third-party deadline, but that they may register in person through the close of polls.





Section 2:

## Make a Plan



## Your Options for Voter Engagement Activities

Below is a list of common voter engagement activities to get you started. Remember: everything must be done on a nonpartisan basis.

### VOTER REGISTRATION

**Every year, thousands of potential voters are disenfranchised simply because they miss the registration deadline or don't remember to update their registration when they move.**

Whether you focus your efforts on National Voter Registration Day, or the months leading up to the election, registration is (almost) always the first step for someone to be a voter. Depending on your capacity, you may choose one of the following 3 options for voter registration at your organization:

#### 1. Publicize and Promote

Promote voter registration deadlines and how-to's in the weeks before the election. This is the option that needs the least capacity and staff training.

- Make announcements about the voter registration process and deadlines on your digital communication channels.
- Include a link to your state's voter portal if online registration is allowed.
- Put up posters or offer flyers with voter registration information to clients in person.
- Sign up as a National Voter Registration Day community partner for free posters and stickers at [nationalvoterregistrationday.org](https://nationalvoterregistrationday.org).
- Talk about registering to vote at a staff or board meeting. Encourage all of your staff and volunteers to register to vote.

#### 2. Conduct On-Site Registration

If you have a medium amount of capacity, you can incorporate voter registration into your ongoing activities and community member interactions. Ensure staff interacting with clients, participants, and volunteers are trained on how to be nonpartisan when conducting voter registration.

- Train staff and/or volunteers on how to conduct voter registration in compliance with state laws.
- Make voter registration forms widely available and offer new clients the opportunity to register during intake or other processes.
- Designate a staff person to promptly return forms to your local elections office in person once a week, if permitted. See State Guide for more information on state-specific laws and requirements.





### 3. Mobilize and Partner

If you have the time and resources, extend your registration efforts outside your nonprofit to the community you serve.

- Identify partners in your neighborhood or service area– like other nonprofits, libraries, schools, or small businesses – and encourage them to register voters.
- Have staff or volunteers set up a voter registration table at community events or highly trafficked areas. Good locations are where likely voters from the neighborhood congregate – supermarkets, stores, school events, places of worship, transit stops, etc. Check with the desired site first to make sure you have their permission to set up a table.

### VOTER EDUCATION

Use the same strategies for voter registration, but add information about when, where, and how to cast a ballot.

### Safe and Fair Elections

The Election Protection Coalition is a group of nonpartisan nonprofit organizations that offer many resources including a hotline that provides comprehensive information and assistance on all stages of voting – from registration, to absentee and early voting, to casting a vote at the polls, to overcoming obstacles to their participation. Share this hotline with your community so that they can speak with a trained election protection volunteer if they have questions or run into confusing situations or have legal questions at the polls.

- **English:** 1-866-OUR-VOTE (1-866-687-8683)
- **Spanish:** 1-888-VE-Y-VOTA (1-888-839-8682)
- **Asian languages:** 1-888-API-VOTE (1-888-274-8683)
- **Arabic:** 1-844-YALLA-US (1-844-925-5287)
- **Text:** 1-866-OUR-VOTE (1-866-687-8683)
- **Email:** [hotline@866ourvote.org](mailto:hotline@866ourvote.org)





## Create and/or Distribute Nonpartisan Voter Engagement Questionnaires

Nonpartisan candidate questionnaires provide an important, unbiased overview of how the candidates your community will be voting on answer questions related to your mission. You can create your own or distribute another organization's nonpartisan questionnaire. For more information on how to create a candidate questionnaire, see the section on "Candidate Questionnaires" later in this resource.

## Include Lessons About Voting

Does your nonprofit have classes or training? Consider holding a mock election or hosting a discussion about the principles of a fair democracy or fair election. Be sure to discuss the election with community members who are not able to vote and develop ways they can participate as volunteers.

## Promote Poll Worker Opportunities

Share information on how to become a poll worker. In many states these are paid volunteer positions that any registered voter can be trained for, but they will need to be on-site the entire day.

**Learn more at Nonprofits, Democracy, and Voting: They Go Together So Well at <https://www.councilofnonprofits.org/articles/nonprofits-democracy-and-voting-they-go-together-so-well>**

## Key Takeaway

There are many effective and creative ways to conduct nonpartisan voter engagement and you are encouraged to explore ideas that will feel inviting and celebratory for your audience.





## Get Out The Vote (GOTV)

### **Make Calls or Send Texts to Potential Voters**

If you have phone numbers for clients, consider sending them an informational text with election reminders or organize a phone bank to call (and leave messages) for registered voters. Be careful to send the messages out broadly; don't pick and choose among your contacts in ways that could give the impression of partisan bias.

### **Display or Distribute Sample Ballots**

Seeing a sample ballot helps people familiarize themselves with the voting process, giving them greater confidence to cast an actual ballot on Election Day. Share instructions for how to find sample ballots on your state or local elections website. Political parties sometimes publish sample ballots marking their candidates as the “correct” answers. A nonpartisan sample ballot lists the candidates and ballot questions as presented on the official ballot without designating any particular candidate.





## Selecting the Best Activities

Most organizations will not attempt every possible voter engagement activity. Many start by choosing just a couple and experimenting with how to combine voter engagement with their existing services and programs. Answer the following questions to identify the right activities for your organization.

### Who's Your Audience?

Consider the various audiences for your voter participation activities and communications. The activities, messages, and format of the communications you choose may change depending on your audience, including:

- Your members, service population, or other constituents,
- Your staff, board members and volunteers, or
- Your neighborhood or local community.

### What Do They Need?

Most people benefit from reminders about upcoming elections and information about who and what is on the ballot. Some voters have additional needs. Identify the barriers your audience may face when trying to vote to anticipate the information or assistance needed to successfully cast a ballot. Examples include:

- Eligibility and registration because they are a new or returning citizen, an out-of-state student, experiencing homelessness, or anyone lacking a current state ID for any reason,
- Accessibility and accommodations due to disability or language barriers, or
- Getting time off from work to vote or transportation to and from the polls



## Who's Involved?

Determine who should be involved, such as staff, volunteers, constituents, and partner organizations. These people will need some training to effectively engage prospective voters. Consider:

- Front office staff who do intake or manage materials and signage in the lobby.
- Volunteers or interns who can take on a voter participation activity as a special project.
- Program staff who can weave voting into ongoing program activities.
- Communications team who creates assets and runs your website and social media.
- Partner organizations, coalitions, or local elections boards that can expand your reach.

## What Are Your Communication Vehicles?

Plan with the people in charge of your communications and website to include messages and announcements about registration and voting in the weeks leading up to the election. Depending on how you reach your audience some of these may be more effective than others:

- Signage, posters, and handouts in your lobby or service areas
- Phone calls or texts
- Digital channels: website, social media, newsletters, paid advertising
- Staff meetings or emails

## How Are You Tracking and Celebrating Efforts?

If you are taking the time to run a voter engagement campaign, take the time to track, celebrate, and share your success! The documentation you do during the campaign can be used for fundraising, developing partnerships, and raising your profile. Keep track of:

- **Story:** Take pictures of engagement activities and collect quotes from staff, volunteers, and potential voters.
- **Metrics:** Track the number of voter registrations collected as well as events, discussions, and other voter interactions. Include digital voter outreach, such as social media posts and newsletter mentions.
- **Post-Election:** Share photos and stories from people your nonprofit helped to vote. Consider ways to use them soon after the election to demonstrate your community engagement work and save them to inspire people before the next election.

## Key Takeaway

There are many options for voter engagement activities, so choose ones that align with your interests, capacity, and client needs.





## Partnering for Success: Local Elections Office and Beyond

Partnering with another local nonprofit organization can be a mutually beneficial relationship, fostering community engagement, social impact, and often, increased visibility for both parties. Here are some tips to make the most out of such partnerships:

### Identify Potential Partners

There are three types of partnerships your organization can benefit from when conducting voter engagement:

- **Local and State Election Offices:** Having a contact at an election office is invaluable when questions or needs come up. **Election officials appreciate when organizations reach out, utilize their resources, and provide voters with accurate information.**
- **Voter Outreach Organizations:** Look for organizations that provide quality, nonpartisan voter engagement resources and are operating locally. These organizations may be able to provide additional insight, tools, resources, or volunteers.
- **Existing Partners with Shared Goals:** Look to your current nonprofit partners whose mission aligns with your values and goals – including your complete commitment to remaining nonpartisan – or whose service population overlaps with your own. You may be able to share resources or team up to better integrate voter messaging and activities.

### How to Develop a Lasting Partnership

**Open Communication:** Initiate a dialogue with the organization's leadership team to discuss potential partnership opportunities and be transparent about your objectives, resources, and limitations. Emphasize that your goal is to provide accurate, nonpartisan information to eligible voters so they will have an easier time getting to the polls and casting a ballot.

**Define Roles and Responsibilities:** Clearly outline each party's roles and responsibilities within the partnership. Establishing expectations upfront helps prevent misunderstandings and ensures that both parties are committed to achieving common goals.

**Collaborative Projects:** Brainstorm collaborative projects that leverage the strengths of both organizations. Whether it's hosting joint events, conducting community outreach, or launching fundraising campaigns, collaboration can amplify the impact of your efforts.

**Promote Each Other:** Use your respective platforms to promote each other's initiatives and events and celebrate successes along the way. Recognize the achievements of both organizations and the positive impact of your partnership on the community.





Section 3:

## Engaging with Potential Voters



## Tips for Successfully Engaging Potential Voters

One of the reasons nonprofits are great resources for voter engagement is because of the relationship we have with our communities. An organization can use all the digital tools or fancy talking points but at the end of the day, voter engagement is a year-round initiative focused on talking directly with potential voters, building trust through relationship and honest communication.

Staff working for 501(c)(3) nonprofit organizations should be nonpartisan when representing their nonprofit on site, at events or doing voter engagement activities. Nonprofits and staff cannot suggest which candidate to vote for or political party to support. This includes not wearing buttons, hats, or t-shirts for a candidate.

When engaging potential voters at festivals or events, you can use large signage to attract attention. Banners, posters, balloons, and other decorations can make your information table visible. You can bring snacks, or other freebies to encourage people to visit your table; however, legally, you must give these out regardless of whether someone registers or not.

Be proactive! Stand up, get out from behind the table, and greet people. Find a phrase or greeting that will catch the attention of passers-by (ex. “Did you know there are only 10 days until the voter registration deadline?” or “Do you have plans for November 3rd yet?” or “Do you like potholes? Because local elections could impact the number of potholes in our community.”...etc.) When you’re talking to somebody, offer them a pen and clipboard to fill out their information.

### Sample Scenarios

Prepare for the conversation you will get to have, including with people who are hesitant to participate. Here are some common responses to keep in your back pocket:

#### ***“I Don’t Have Time.”***

“I understand. It only takes a couple minutes and doing it now will save you time later. I can answer any of your questions and ensure it gets turned in according to state law.”

#### ***“I Don’t Want to Register” or “I Don’t Care About Voting.”***

Respect their hesitancy. You can’t convince everyone, but you’ll get better at trying.

- “Candidates pay more attention to communities where everyone’s registered. They won’t always do what we want, but they’re more likely to pay attention if we register to vote.”
- Cite an important issue in the upcoming election. Give an example of what the city council, state legislature, or Congress might be voting on next year, being careful to remain strictly nonpartisan.
- Remind them that they won’t be voting alone – they’re voting with and for their families, neighbors, and community.





### ***“I Don’t Know Any of the Candidates.”***

Suggest that they look up a voter guide on [Vote411.org](https://www.vote411.org), [BallotReady](https://www.ballotready.org), [Vote.gov](https://www.vote.gov), check the candidate’s official campaign website and social media, or talk to family and friends. They might be able to find someone who can bring them up to speed.

### ***Can I Say Anything About Specific Candidates?***

You can only answer simple facts like what party they are in, if they are an incumbent or challenger, or where they live. Remember you need to remain strictly nonpartisan. Do not state your preferences.

### ***What Do I Say When Asked About the Difference Between Republicans and Democrats?***

There is no good answer or any accurate source that doesn’t have a bias. You could mention the names of the current nominees and their party, but go no further. Suggest they ask a trusted friend or go to the political parties’ or candidates’ official websites.

### ***What If I’m Asked About a Ballot Measure?***

Ballot measures are about enacting laws not electing candidates. You may discuss the pros and cons of a ballot measure unless it is your organization’s policy not to. You can also tell them if your nonprofit has an official position on one or more ballot questions and, if it does, why.





## The Why Vote Tool

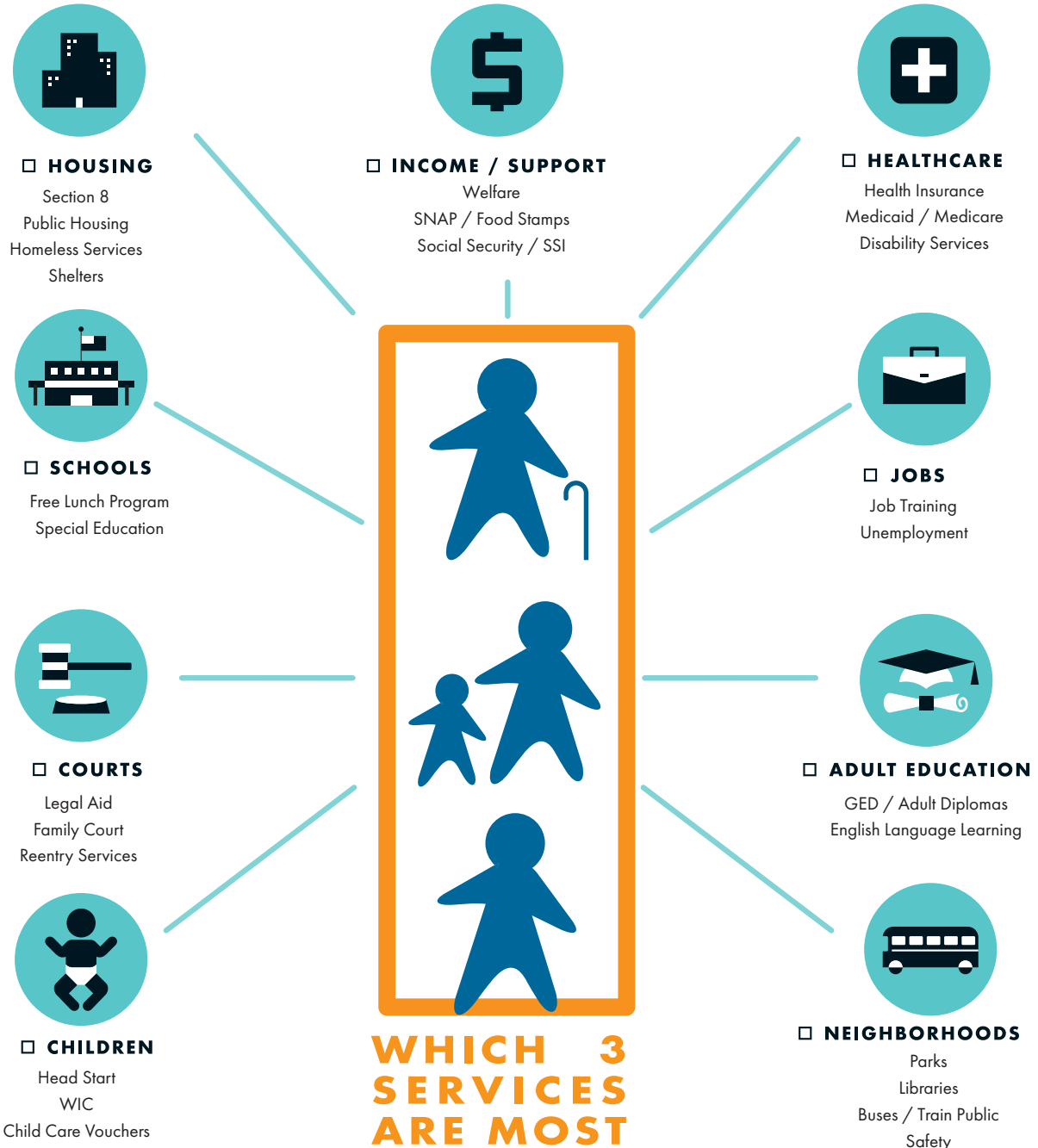
The Right Question Institute's nonpartisan 'Why Vote?' Tool and accompanying resources focus on having people discover for themselves the value of voting. The tool helps people see the connection between services they need –such as food assistance, income support, and childcare – and decisions that elected officials make. Direct service providers, educators, community organizers, and others use the tool for voter engagement, outreach, mobilization, and education.

Use this resource to engage potential new voters. It's a way for people to think about connections between services they receive and decisions elected officials make and to see for themselves the value of voting. You can use this resource with clients, adult learners, students, neighbors, and anyone else you would like to engage to vote. Invite them to think about the value of voting by asking them to choose three services that are important to them. On the back of the resource, there are spaces for users to reflect and come up with their own questions about voting. There's also space to customize this tool by leaving your agency's contact information or local voting information.



# The Why Vote Tool

## EXAMPLES OF GOVERNMENT SERVICES



# The Why Vote Tool

## YOUR VOTE AND GOVERNMENT SERVICES

Elected officials make decisions that affect all these services.

By voting, you can have a say in who makes those decisions.

Why would YOU want to vote and have a say in who is making decisions about those services?

What questions do you have about being able to vote in the next election?

Ask as many questions as you can.

What did you learn?

For more information about voting, visit: [vote.gov](https://www.vote.gov)

You can also find where to vote by searching online "find my polling place."

Distributed in partnership with:



NonprofitVOTE.org



Created by the Right Question Institute  
Source: [rightquestion.org](https://rightquestion.org) © 2026





## Section 4:

# Allowable and Restricted Nonprofit Activities



## Federal Funds and Nonprofits

All 501(c)(3) organizations, including charitable nonprofits and houses of worship, must follow the same IRS rule barring these organizations from conducting partisan political activities to support or oppose candidates for elected office. The IRS rule, however, allows nonprofits to conduct voter engagement and election activities on a strictly nonpartisan basis. Nonprofits that receive different types of federal funding may have additional requirements that either require or prohibit engagement in voter registration or other activities.

### Federal Funds with Requirements to Do Voter Registration

[The National Voter Registration Act](#) (NVRA) of 1993 requires several types of federally supported agencies – such as those that offer public assistance or state-funded programs for people with disabilities – to proactively offer the people they serve the opportunity to register to vote. This includes nonprofit agencies like community health centers or food pantries that sign people up to receive Medicaid, WIC, food stamps and other programs otherwise covered by the NVRA.

See our [factsheet on the National Voter Registration Act](#) for more information.

### Federal Funds with Limits on Voter Registration and Related Activities

In a few special cases, Congress has added stipulations on the use of certain federal funds to restrict voter registration and rides to the polls. As of this writing, these limitations only apply to the programs described below.

While the Office of Management and Budget (OMB) is proposing a rule to bar use of federal funds for voter registration activities, that rule would not impact voter registration activities done with non-federal funds, will be subject to litigation, and would not likely impact the 2026 election cycle even if enacted. What follows is current law as of 2026.



## Federal Funds with Voter Registration Restrictions

### Community Services Block Grants (CSBG)

Nonprofits who receive Community Services Block Grant funding, like Community Action Agencies: CANNOT

- Use CSBG funds to pay for staff or materials to conduct voter registration.
- Use CSBG funds to provide rides to the polls.
- Associate CSBG funding with a particular candidate or political party.

CAN

- Use non-CSBG funds to do voter registration such as having staff or others not paid by CSBG funds help register voters, so long as it's not identified as a service of the agency. In this case, voter registration should be done outside of service delivery, for example, at a table or local event.
- Use CSBG or other funds to do any other kinds of nonpartisan voter engagement activities to promote voter education and voter participation such as reminding staff and clients about an upcoming election. However, it is recommended that CSBG funds used for nonpartisan election activity be limited and not done in a way to give public perception of the agency as being in any way involved in partisan politics.

### Head Start

Head Start has similar restrictions to that of CSBG recipients, except Head Start had language added in 2007 to amend the Head Start Act to affirm a Head Start program's right to have outside groups do nonpartisan voter registration drives at their sites. A Head Start program:

CANNOT

- Use Head Start funds to conduct or have employees conduct voter registration activities.
- Use Head Start funds to provide rides to the polls.

CAN

- Have a nonpartisan organization or non-Head Start personnel do voter registration at Head Start facilities during all hours of operation.
- Do any other type of nonpartisan voter education, such as keeping parents and others informed about how, when, and where to vote.

### Do Community Development Block Grant (CDBG) Funds Have Similar Restrictions?

- No. Unlike with Community Services Block Grant (CSBG) funds, there are no restrictions on doing voter registration or any type of nonpartisan activity. A nonprofit with CDBG funds should follow the same rules that apply to any 501(c)(3) organization barring partisan, political activity to support or oppose candidates for elected office.



## AmeriCorps and the Corporation for National and Community Service (CNCS)

AmeriCorps members and other recipients of CNCS funding are subject to the standard 501(c)(3) prohibition on partisan political activities to oppose or support candidates for elected office. Additionally, while charging time to the AmeriCorps program or otherwise performing activities supported by the AmeriCorps program, CNCS supported personnel or service volunteers:

### CANNOT

- Do voter registration during work hours or while performing work for the host organization.
- Make voter registration forms and information available on the premises for clients.

### CAN

- Conduct any other type of nonpartisan voter education as undertaken by the organization where they are doing service.
- Do political activities in personal time outside of work and when not representing the organization they are assigned to.

## Legal Services

Legal Services groups are the most restricted. Legal Service employees and volunteers are generally prohibited by the Legal Services Act (LSA) and related policies from conducting any kind of nonpartisan or partisan political activity or issue advocacy.

## Resources

- CAPLAW, Election Year Refresher for Nonprofit Community Action Agencies-updated 2024, [https://caplaw.org/wp-content/uploads/2024/10/CAPLAW\\_2022\\_election\\_year\\_refresher\\_for\\_nonprofit\\_CAAs.pdf](https://caplaw.org/wp-content/uploads/2024/10/CAPLAW_2022_election_year_refresher_for_nonprofit_CAAs.pdf)
- Legal Information Institute, Prohibited uses of CDBG Funds, <https://www.law.cornell.edu/cfr/text/24/570.207>
- Corporation for National and Community Service, Prohibited Activities, <https://www.ecfr.gov/current/title-45/subtitle-B/chapter-XXV/part-2520/section-2520.65>
- Legal Services Corporation, Regulations CFR 45 Part 1608, <https://www.ecfr.gov/current/title-45/subtitle-B/chapter-XVI/part-1608>
- Nonprofit VOTE, National Voter Registration Act Factsheet, <https://www.nonprofitvote.org/resource/national-voter-registration-act/>
- Department of Justice, Civil Rights Division, National Voter Registration Act (NVRA) FAQ, <https://www.justice.gov/crt/national-voter-registration-act-1993-nvra>



# Ballot Measures

## What is a Ballot Measure?

Ballot measures ask voters to vote on laws, bond/finance issues, or constitutional amendments. If the vote is on a proposed law, it's called a "ballot initiative." If the vote is on a law already passed by the legislature, it's called a "referendum."

## Can a Nonprofit Take a Position For or Against a Ballot Measure?

Generally, yes. Activity supporting or opposing ballot measures is considered lobbying – not electioneering for or against a candidate – and as a result a charitable organization will not be considered engaging in partisan, election-related activities. Charitable 501(c)(3) nonprofits may advocate to pass or defeat a ballot measure as a lobbying activity, subject to normal limits on lobbying.

## What are Common Activities Nonprofits Take on Ballot Measures?

Organizations can engage in a range of activities related to ballot measures such as – collecting signatures to put an issue on the ballot, endorsing or opposing the measure, communicating your position to influence the public, organizing volunteers to work on passage or defeat of a ballot measure, or hosting an educational forum or event. You can also distribute neutral educational materials designed to inform the public about both sides of the question.

## How Much Can a 501(c)(3) Nonprofit Spend on Lobbying?

Your spending limits depend on which test your nonprofit chooses to measure lobbying.

1. Unless your charitable nonprofit has filed the simple and easy 501(h) form, then it automatically falls under Section 501(c)(3)'s unclear limitation on lobbying: "no substantial part of the [charity's] activities" can be "attempting to influence legislation." Neither Congress nor the IRS has clarified what constitutes "substantial" or "insubstantial" lobbying activities or where the dividing line is drawn. Importantly, this default standard in Section 501(c)(3) looks at the organization's full "activities," and not at the amount of dollars spent.
2. To avoid uncertainty, many charitable nonprofits instead choose to take the 501(h) election, which sets clear, objective guidance by comparing how much they spent on lobbying in a given year to the organization's total expenditures. To take the 501(h) election, nonprofits will spend less than five minutes filling in a few simple items on IRS Form 5768. Learn more at <https://www.councilofnonprofits.org/everyday-advocacy/taking-501h-election>.

## Are There Any Spending Limits for Ballot Measure Advocacy?

There are no limits on spending on ballot measures, beyond the limits on lobbying discussed above. Some states require you to file an expenditure report if you devote substantial funds to ballot measure advocacy as, for example, a primary sponsor of a ballot measure, an active partner, or as a financial contributor for a particular advertisement. Contact your state's campaign finance office for more information.





## Post-Election Advocacy Planning Tool

With the ideas and tips in this tool, you can help your nonprofit and its mission be more visible to elected officials, make connections between constituents and their elected leaders about issues that impact your community, and build a stronger democracy for all. The content provided in this tool is provided in good faith for informational purposes only and is neither intended to be nor should be construed as legal or tax advice. First, a quick distinction:

**Advocacy** is raising awareness and mobilizing public support for an issue or set of values, such as supporting education access, ending hunger, expanding affordable housing, and so on. Nonprofits can generally engage in non-lobbying advocacy without limit.

**Lobbying** involves asking policy makers, either directly or indirectly (by encouraging others to do so), to vote for or against a specific piece of legislation or policy. Nonprofits that take the 501(h) election have more leeway and clear guidelines when lobbying.

Whether your organization engages in advocacy, lobbying, or both, there are strategies you should think about to ensure success:

### 1. Identify Which Officials Make Decisions Related to Your Organization's Priorities.

- a. Be clear about what your organization is trying to accomplish or change. Identify which governmental officials have authority over those policies.
- b. Check government websites or a nonpartisan resource like Ballotpedia to find position descriptions.
- c. What region do they cover (national, state, local, city council ward...etc)?
- d. What branch of government are they in (legislative, judicial, executive)?
- e. Is the position full-time or part-time?
- f. Are there certain qualifications required for the position (ex, Law director must be an attorney...etc.)
- g. Are they part of a larger body that needs a majority to pass legislation (city council or state legislative body), or are there actions they can take independently (mayor, governor, etc.)?
- h. Do they have influence over budgets?
- i. What is the timeline for their term?



## **2. Educate Yourself and Your Team on Those Elected Leaders, Their Position, Their Experience with Your Issues, and Their Priorities in Order to Have a Productive Conversation.**

- a. Check government websites (check for .gov to be sure you're on a government and not a campaign website) for lists of elected and appointed positions.
- b. Has this person been elected to this position before? To another related position (Ex. State House to State Senate or City Council Member to Mayor)?
- c. What is their experience, professional or otherwise and what organizations are they associated with (ex. nonprofit boards, professional associations, political parties, do they volunteer or donate to particular organizations)
- d. What are the causes they care about and why?
- e. How have they voted on the issues your organization cares about?
- f. Remember to look for state, county, city, township, district, ward, borough, school district, and any other areas of government that might have elected or appointed leaders.
- g. Find their email, phone number, physical office address, and web portal if they have one (see the example tracker below) and join their email newsletter where applicable. They may answer communications directly or they may have an administrative staff member.

## **3. Prepare Your Organization to Build Relationships with Elected Leaders and Share Your Expertise.**

- a. Review lobbying policies for your organization. The executive director or board should have access to or create policies to provide guidance for staff who may be carrying out the work.
- b. Learn about the policy maker's influence, goals and motivations. Is there a topic or issue in which your nonprofit has expertise? Do you operate in the elected official's district? Do any of your board, staff, or volunteers have a connection with the elected official?
- c. Make a plan for documenting and tracking any lobbying activity or interaction with elected leaders. If you have taken the 501(h) election, you'll want to document expenditures as well.
- d. Review lobbyist registration requirements. Lobbyist registration is most common at the state and federal level but may be required at the county or city level too.
- e. Develop one pagers and other materials that explain your priorities in a clear and concise manner and in a form that you can leave behind with the elected leaders.

## **4. Establish an Organizational Relationship with Your Elected Official(s).**

- a. Focus on building relationships with elected leaders over time. If you want your organization to be known as a trusted entity for addressing community issues, it will take time.
- b. Set up an educational meeting with them or invite them to your nonprofit to help them better understand your organizational mission and the community's need for your organization. Invite them to opt into your organization's communications like newsletters, fundraiser invitations, texts, holiday cards, etc.
- c. Be polite and persistent with communications. Elected leaders often receive a great deal of communication so response times may be slow, but it is responsible for them to respond.

## **5. When Your Organization's Issue is Up for a Vote or Critical Discussion, How Can You Participate?**

- a. Where are legislative meetings held? In person? Virtual? Are they recorded?
- b. How do you sign up to comment on legislation? What is the timeline? Written or spoken comments? (ex: via website, email, call, or in person comment).
- c. Remember that sometimes delays or changes to agendas are intentional political moves, some times they are just the reality of the process.

## 6. Evaluate and Celebrate Your Work.

- Talk about your advocacy work and the issues your organization is addressing. Advocacy can be an important part of your mission and a great way to engage new audiences.
- Document and evaluate your work to ensure the lessons you learned and relationships you built will position your organization to be more effective each year.

### Resources

- [Lobbying Under the Insubstantial Part Test \(the default for nonprofits\), from Alliance for Justice \(AFJ\)](#)
- [Maximize Your Lobbying Limit by taking the 501\(h\) Election, from Bolder Advocacy / Alliance for Justice \(AFJ\)](#)
- [IRS H Election Form](#)
- [Ballotpedia Directory of Elected Officials](#)

### Example Elected Leader Tracker

These are all made up examples to show possibilities.  
Create your own based on your locality with this tool.

| Position                        | Name           | Phone          | Email Address                                                                         | Last Elected & Next Election | Responsibilities                               | Notes<br>(When they were elected, when their next election is, if they've held any elected positions in the past) |
|---------------------------------|----------------|----------------|---------------------------------------------------------------------------------------|------------------------------|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| U.S. Senator                    | Ex. Jo Jenkins | (555) 555-5555 | jo.jenkins@us.senate.gov<br>Staff Scheduler: Percy Price<br>percy.price@us.senate.gov | Last: 2024<br>Next: 2030     | Ex. Votes to confirm presidential appointments | Ex. Former teacher, voted in favor of additional FEMA investment                                                  |
| U.S. Congressional District(s)  |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| Governor                        |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| State Senator                   |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| State Representative            |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| County Executive, or Commission |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| Mayor                           |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| City Council Member             |                |                |                                                                                       |                              |                                                |                                                                                                                   |
| School Board Members            |                |                |                                                                                       |                              |                                                |                                                                                                                   |





Section 5:

## How-to Guides

# Choosing Between Paper-Based and Online Activities

Paper, digital, or both? How should your organization approach engaging voters, especially when it comes to official forms like voter registration or voting by mail? This quiz can help.

## Who are You Trying to Reach?

- A. Low-income voters and those without state IDs, older voters, or voters who use your services.
- B. Younger voters, college students, or the friends and families of voters connected with your organization.
- C. Your staff, volunteers, or supporters of your organization or cause or voters who speak a language other than English at home

## Where or How Do You Normally Interact with Them?

- A. In-person when providing services (either at your organization, their homes, or at a recurring venue)
- B. In-person at community events, while door knocking, or at neighborhood hot spots (like a bus station, grocery store, or public park)
- C. Via your website, newsletter, social media, text campaigns, or phone call

## What Special Strengths Does Your Organization Have?

- A. Your staff is good at walking clients through paperwork, you have a waiting area, or your staff and clients have one-on-one time.
- B. You have a lot of voter-facing staff or volunteers who can wear voting swag (like buttons, stickers or lanyards).
- C. You have tech-savvy staff/volunteers, you have access to a large social media audience or social media influencers.

## What Limitations Does Your Organization Have?

- A. Internet service in your area is unreliable or your staff is less comfortable with digital platforms.
- B. Your staff or volunteers are too busy to assist voters one-on-one or are trying to minimize close interactions for health/safety reasons.
- C. There are restrictions on who can conduct voter registration in your state or you have few in-person interactions with voters.

## Results

**Mostly As:** Try a paper-based strategy. Your staff and voters may have the best luck with good old-fashioned paper and pen. Develop a relationship with your local elections office to receive printed voter registration forms.

**Mostly Bs or a Mix:** Consider blended organizing. It's good to have paper on hand for when internet access is spotty or devices aren't working and for voters who just feel more comfortable filling out a paper form. Add digital components to your in-person efforts by putting links and QR codes on your materials, such as a lanyard card, so voters can engage from their own device.

**Mostly Cs:** Focus on digital outreach. From your state's voting website, to online voter guides, to motivational apps, there is plenty of content to populate your communications channels. Develop messaging that will resonate with your unique audience.





## Hosting a Phone or Text Bank

### Why Host a Phone or Text Bank to Reach Voters?

Phone or text banking involves individual outreach to eligible voters through phone calls or text messages. Contact from a trusted organization can help prepare and motivate people to vote and is more effective than emails or postcards. Include phone or text banking as part of your strategy in the weeks leading up to the election.

### Benefits Include:

- Flexibility to organize staff and/or volunteers in-person, at a distance, all at once, or over many shifts.
- Enjoyable for your staff and volunteers.
- Voter engagement messages can be paired with wellness checks, invitations to events/services, or other messages you want to get out to your community.

### Every Good Phone or Text Bank has 4 Key Ingredients:

1. A list of clients/registered voters to contact.
2. Staff or volunteers (phone/text bankers) to make the calls/texts to voters.
3. A tracking system (e.g. shared spreadsheet like a google doc, your existing CRM might have options, or you can use a company with more robust texting programs) to record voters' answers and important notes. Tracking is especially important if you plan to do multiple rounds of calls to voters who don't pick up at first.
4. A script to guide their interactions.





### **What if I Don't Have a List of Clients or Community Members that Includes Their Name and Phone Number?**

There are a few options. You can buy a list for your area from a data company (rates vary but, in some areas, it could be around \$50 for a few hundred names and numbers). You can also collect the desired contact information in a way that makes it clear to your audience of clients or community members that you're going to follow up with them about voting.

### **Who Should I Ask to Phone/Text Bank? How Many People Should I Ask?**

For every 100 phone numbers, recruit two people to phone/text bank for two hours (you could also recruit four people for a Power Hour!) Consider asking staff to participate, as well as committed volunteers, members of your board, or program participants. Members of a local youth leadership program make great bankers. Recruit bilingual speakers if many people in your community speak languages other than English as a primary language.

### **What Every Phone Banker Should Know:**

If this is your first-time phone-banking, welcome! This is generally a very positive experience for both the caller and the potential voter being called. Keep in mind the following:

- It will feel awkward at first and that's okay! You'll start feeling more comfortable after the third or fourth conversation.
- Most people won't pick up the phone, and you may only have a handful of conversations with voters. This is okay too! Every call makes a difference.
- You never have to stay on the phone with someone rude or aggressive. If you feel uncomfortable, disconnect the call, and make a note in the tracker.





## Candidate Engagement

### Sharing Your Policy Ideas

Educating candidates about policy solutions you are prioritizing is an important step to ensuring all candidates have a robust plan. This helps ensure that the newly or recently re-elected official will work to address these challenges while in office.

Sharing your policy ideas with a candidate is similar to how you would engage an elected official. Utilize email, in-person meetings, social media, or other contacts to make them aware of your policy priorities. Additionally, be sure to engage all candidates when doing your outreach. Do not conduct research on behalf of a candidate or campaign and do not sign your organization's name on to their policy proposals or platforms issued as part of their campaigns as that can be viewed as an endorsement of support.

### Candidate Appearances at Your Nonprofit Event

During the election season, a candidate may appear at your nonprofit event in one of three ways: 1) in their capacity as a candidate invited to your event, 2) in their capacity as a public figure invited to your event, or 3) as an uninvited attendee at a public event. Each scenario has different guidelines to ensure that their appearance maintains your organization's nonpartisanship.

#### 1. Inviting Candidates to an Event in their Capacity as Candidates

Your nonprofit may want to invite candidates for office to a function or event to expose them to your work, develop relationships with future office holders, or for a purpose related to your ongoing programs.



If you invite all the candidates to the SAME event:

- Invite all candidates from all political parties in the same race. They don't all have to come, but all must be invited.
- Remind candidates – in writing – that they are attending as guests – campaigning and political fundraising are prohibited.
- Remind the audience that this is a nonpartisan event.
- The atmosphere is kept entirely nonpartisan and free of campaign activity with no campaign brochures or materials distributed or on tables.

If you invite candidates to appear at DIFFERENT events:

- Provide equal opportunities to candidates for the same office, including a similar time, venue, and presentation format.
- Remind candidates – in writing – that they are attending as guests – campaigning and political fundraising are prohibited.
- Prior to introducing the candidate, clarify for the audience that the appearance is not an endorsement and that there will be additional opportunities to meet the other candidates.
- The atmosphere is kept entirely nonpartisan and free of campaign activity with no campaign brochures or materials distributed or on tables.

Keep in mind that elected officials are themselves candidates when they are running for re-election in a primary or general election. This is particularly important to remember in the last two months leading up to the election.

## **2. Inviting a Candidate to an Event in Their Capacity as a Public Figure**

A charitable nonprofit may invite a candidate to an event in their capacity as a recognized public figure, like an elected official or expert in their field. You might invite a candidate to speak because they 1) currently hold, or formerly held, public office; 2) are considered an expert in a field unrelated to office held; or 3) are a celebrity or have led a distinguished public service, military, legal, or other career. Under these circumstances only extend an invitation if:

- The candidate is chosen to speak solely for reasons other than their candidacy and speaks only in a non-candidate capacity.
- There is no mention of their candidacy during the presentation or event.
- Remind the public figure – in writing – that they are attending in that sole capacity and not as a candidate, and that campaigning and political fundraising is prohibited.
- The atmosphere is kept entirely nonpartisan and free of campaign activity with no campaign brochures or materials distributed or on tables.

## **3. Candidates Attending Your Event on Their Own Initiative**

Candidates may appear at a public event held by your nonprofit on their own initiative. Take care that there is no actual or implied endorsement. Do not give the candidate an opportunity to address the gathering or distribute campaign literature.





## Candidate Forums

### Keeping Your Forum Nonpartisan

When planning your nonprofit candidate forum, remember – nonpartisanship is key! Not only is it required for 501(c)(3) organizations, but it also encourages attendance by candidates, attracts more interest from the media, and is an effective tool for engaging your community around the issues that matter to them.

### Basic Guidelines for Staying Nonpartisan

- The forum should cover a broad range of issues.
- Candidates should have equal time to present their views.
- The candidates are asked about issues but are not asked to pledge to or agree with specific positions of the sponsoring organizations.
- The moderator stays neutral and does not imply approval or disapproval of the candidates.

**Read about Rosie's Place, a community center serving women experiencing homelessness, and how they meld empowering women with civic engagement through candidate forums at <https://www.nonprofitvote.org/resource/rosies-place/>**

Staying nonpartisan is fairly straightforward. Here are some tried and true tips from the experts:

### Inviting the Candidates

Invite all viable candidates for a specific office to your forum and make an equal effort to encourage each of them to attend. If it is a two-candidate race and only one agrees to attend, you should not go forward with your forum because it could be perceived as partisan with only one candidate.

#### **Q: What About a Race with Several Candidates?**

At least two candidates must attend for the forum to remain nonpartisan. You may want to ensure the front runners can attend, but having any two or more is enough to make it nonpartisan.



## Q: What About a Last-Minute Cancellation?

If it is a two-candidate race and one cancels with very little notice, or worse, doesn't show up, you may cancel or go forward with the candidate event as planned. If you go forward, make sure to announce that this in no way signifies the endorsement of the attending candidate by your organization. Avoid disparaging the non-attending candidate.

## Questions Asked at the Forum

You may want to have one or more staff members in charge of reviewing audience questions before handing them to the moderator. Your forum should ask clear, relevant, and balanced questions; none that signal a bias for or against a candidate. It's ok to ask straightforward questions on the issues, but balance these across partisan lines.

## Ground Rules Inside the Forum

**Partisan Attire:** Insist in advance that anyone helping to staff the event may not wear partisan attire (e.g., t-shirts, hats, buttons). While not required, you may want to ask audience members to check their partisan materials (including buttons and signs) at the door. This helps to create a sense of nonpartisanship within the forum hall.

**Audience:** Ask the audience to respectfully refrain from excessive exuberance for or against a particular candidate.

**Security:** Although not required by laws governing nonprofits, consider hiring security to be visible onsite to help discourage anyone who might otherwise want to disrupt the event.

## Site selection

Choose a neutral site for your forum – one that is not associated with any party, candidate, or strong advocacy for any issue.

## Literature

You may provide nonpartisan voter education and voter registration materials for your audience. Have a separate table outside the room of the forum for candidates to place their campaign literature.

## What the Candidates Want

It is helpful to understand what the candidates hope for in a nonprofit candidate forum. Use this information to entice candidates to attend.

- **A Large Audience!** Candidates are spread very thin during a campaign season. They cannot attend every event to which they are invited. You and your co-sponsoring organizations should focus on turnout to increase the chances that candidates will attend. This is a great opportunity to invite homeowners, volunteers, campus chapters or young professional groups, donors and more to participate. Be sure to communicate your expected audience size to the candidates in advance, as a large turnout at your candidate forum demonstrates that your organization has influence on voters.
- **A Guarantee of Neutrality:** Candidates will avoid any event where they think they could be ganged up on – especially if the media is expected to attend. Remind all candidates of the nonpartisan nature of the forum and share any ground rules you have established to keep everything neutral.

- **A Trusted and Well-Respected Nonprofit in the District:** Leverage your reputation as a respected community organization and partnerships with other nonprofits. Since candidates are aware of nonprofits that have held successful and neutral candidate forums in the past, they will be more likely to attend if those organizations are involved as one or more of your co-sponsors.
- **Time to Meet Informally with Voters:** Allow time after the forum for the candidates to speak one-on-one with voters and shake hands. Tell candidates about this opportunity in your invitation to them.
- **More Information About Your Organization:** In your invitation to the candidates, briefly explain the mission of your organization and your constituency as well as how your organization affects policy – and how those policies hurt and could help your organization's work in the community. Many candidates and elected officials already rely on nonprofits as resources for policy information. This is a fantastic opportunity to mention your policy priorities and issues that impact your community members.

## Selecting a Format

At the top of your to-do list is selecting the format of your forum. As you decide, remember that it's important to select the option that best meets your community's needs.

### Common Formats:

- **Equal Time Q&A:** An impartial moderator and panelists question the candidates, who are allowed equal response time. Traditionally, the candidates are unaware of the exact questions but know the established focus of the program. Candidates may answer the same questions or may be asked different questions, as long as each is given equal time to present their point of view.
- **Follow-Up Q&A:** In this approach, the moderator and/or panelists ask the candidates questions. To get clarifications and more specific answers, follow-up questions are permitted.
- **Town Meeting Q&A:** Members of the audience ask all questions. Questions should be screened by a staff member of your organization to avoid partisan questions and to facilitate substantive dialogue. The audience members asking questions will educate the candidate on the concerns of the constituency.
- **Prepared and Spontaneous Debate:** Prior to the forum, the candidates are presented with several prepared questions constructed to elicit detailed responses. A selection of these questions will be asked at the forum. Candidates will then be asked to give spontaneous answers to questions that originate with the moderator, their opponents and/or the audience.

## Logistics

Ideally, you will begin planning your forum at least 4 months in advance. Shorter timelines can work, but make sure the date and location are set and candidates are confirmed with enough time to do thorough promotion. See the task checklist at [nonprofitvote.org/resource/candidate-forum-checklist/](https://nonprofitvote.org/resource/candidate-forum-checklist/).





## Publicizing Your Forum

1. **Promote, Promote, Promote!** Use all your communication channels. Target and time your online and print to maximize impact. Post flyers and make details about the forum available.
2. **Leverage Partners and Media Outlets** that have featured your work in the past
3. **Use Key Election Dates or Campaign News** to drive communications in the lead-up to the forum.
4. **Try to Personally Contact and Invite** local and regional media outlets. Use this to establish new relationships and raise your profile.
5. **Use a Known Moderator** to draw additional attention (e.g., local news anchor, university professor, retired or former elected leader, civic leaders who are not associated with a political party).
6. **Your Nonpartisanship is an Advantage.** For the media and your audience, a forum is a chance to hear from candidates in a nonpartisan setting rather than hear stock messages from the campaign trail.
7. **Frame Your Forum as a “Community Event”** – one that brings voters and residents together to engage in the democratic process and influence their government.

## What NOT to Do When Planning a Forum

- Start planning late.
- Make assumptions about turnout - typically, actual attendees are half or less of RSVPs.
- Over rely on partners and co-sponsors for audience turnout without verifying their effort (social media posts are great for getting the word out but relational organizing is the strongest tool for turnout).
- Send media releases without personal follow-up.
- Fail to take advantage of media outlets in other languages common to your community.
- Forget good signage around the building so people know where the forum is (including parking, entrance, online accessibility, etc.).
- Leave out instructions to your audience at the start about what will occur — who asks questions, when the audience participates and how, expected decorum, etc.





## Candidate Questionnaires

Candidate questionnaires serve two purposes. First, they collect information about the candidates for voters. Second, they let candidates know the range of issues of concern to the organization(s) preparing the survey. Questionnaires do take time to prepare and require care to ensure they are nonpartisan. If you wish to conduct a candidate survey, consider these key factors and guidelines:

- **Be All-Inclusive.** Surveys must be sent to all candidates running for a particular office and every candidate must be given a reasonable, equal amount of time to respond.
- **Make Surveys Accessible.** Surveys should be on the short side, while including a broad range of relevant issues that are important to the voters. Sending the questionnaires to candidates both by mail and email can help ensure that they receive and complete them. Formats can include a printable PDF, a fillable PDF, or an online tool like SurveyMonkey.
- **Ensure Neutral Content.** Questions should address a range of issues relevant to a specific elected office or reflect a truly broad range of concerns within your issue area and of interest to the electorate. Questions or any description of the issues should be clear, unbiased, and free of leading language in both structure and content. Questionnaires should be limited to one, or at most two, questions about specific policy issues and these questions should not have “correct” answers and should be broad enough that candidates without a background with nonprofits can provide informed answers to them.
- **Provide Full Context and Publish Completely.** The questions posed to candidates should be identical to the questions you later print or post online. You should also publish all answers as received. If a candidate does not respond, simply note “did not respond.” If the questions ask the candidates to respond with “Yes” or “No” or “Undecided,” give candidates the opportunity to provide short one or two sentence explanations on their positions in their own words.
- **Do Not Endorse.** The survey results cannot state whether an answer is “right” or “wrong” and cannot indicate preference for a specific answer or candidate (including a grade or score). Implied endorsements (e.g., through leading questions with “correct” answers) are also not permissible for 501(c)(3) nonprofits.





### Q: What if the Candidate Does Not Respond?

You should list “Did Not Respond.” When a candidate fails to respond, some 501(c)(3)s choose to provide information about the candidate that is a matter of public record or on their website. If you do, be sure to stick strictly to factual information – name, address, etc. – and avoid efforts to summarize the candidate’s positions on issues, which might appear to be slanted to favor or disfavor the candidate.

You should provide all candidates with the same reasonable time period – for example, three weeks – to give their responses and information. As the deadline nears, let the candidates know that if they don’t respond, you will print “did not respond.” While not required, it is a good practice to give the candidates the chance to review the final draft of their information and make any last-minute corrections.

### Reminder

Federal law requires that all 501(c)(3) organizations – charitable nonprofits, private foundations, and houses of worship – remain strictly nonpartisan when doing any civic engagement activity. While the law does not require you to have an attorney provide advice about any of the activities, legal assistance is still advised in many circumstances. The most visible of these are activities that engage candidates for public office. These present more opportunity for an organization to be accused of being partisan or showing bias in favor of, or in opposition to, a particular candidate or political party.

The steps a 501(c)(3) nonprofit must take to prevent bias or partisanship in candidate engagement activities may vary depending on the nature of the issues that would be covered in a candidate forum or questionnaire and other specifics about the nonprofit. Among all the ways to engage candidates, questionnaires make it particularly easy for an evasive candidate to refuse to answer if they can claim the questions are biased. Organizations with less experience may wish to consider starting with activities other than candidate forums or surveys to build more experience. Starting this way shows respect for the law’s nonpartisanship requirement and acknowledges that legal assistance may be needed as activities become more complex.



# Candidate Questionnaire Invitation

Dear Candidate,

On behalf of charitable nonprofits across [STATE], [ORGANIZATION] invites you to participate in our 2026 candidate questionnaire. Through this survey, we invite you to answer questions that affect our state, charitable nonprofits, and the communities they serve.

In [STATE], more than # charitable nonprofits feed, heal, shelter, educate, inspire, enlighten, and nurture people of every age, gender, race, and socioeconomic status. They foster civic engagement and leadership, drive economic growth, and strengthen the fabric of our communities. One in every [#] jobs is at a nonprofit, and the sector is an indispensable partner to government, providing community-focused solutions to critical needs across human services, education, the environment, arts, and more. The nonprofit community is eager to work with elected leaders to continue breaking down barriers for nonprofits and to provide quality services that benefit all [State..ians].

This candidate questionnaire is focused on the nonprofit sector, designed to provide voters and the communities served by nonprofit organizations with insights into candidates' stances on issues impacting the sector. Please share your thoughts and vision about [STATE] and the nonprofit community's part in that vision, by completing this short online survey no later than [DEADLINE].

All candidates' responses received by the survey deadline will be shared (unedited) with community leaders throughout the state.

Thank you for participating.

Sincerely,

[INSERT SENDER]



# Sample Questions

The questions below are examples of what a state or regional nonprofit association might ask candidates for elected office. Not every question will fit every race — one well suited to a candidate for

Congress may have little relevance to a city council candidate beyond a general statement of support. Adapt the set below to the office and level of government you're asking about. Add questions tied to the issues your organization is working on, or include additional context about your policy priorities. Just keep every question nonpartisan — clear, unbiased, and free of leading language.

- *Please describe your personal involvement with, support for, or experiences with the nonprofit sector. How will these experiences shape your policy priorities, if elected? What are your top three priorities, if elected?*
- *Nonprofits are currently facing increased demand for services while managing rising costs and uncertain funding streams. What specific steps would you take to ensure the financial health and long-term sustainability of the nonprofit sector?*
- *The nonprofit sector is a significant employer, making it a vital part of the economy. Workforce shortages at charitable nonprofits result in the loss of critical services on which communities rely. If elected, how would you address the workforce shortages facing the nonprofits who serve your constituents?*
- *Sound tax policies that support charitable nonprofits are one of the most important ways to help organizations secure the resources necessary to serve the public good and address community needs. If elected, how would you preserve and strengthen the tax-exempt status of charitable nonprofits and strengthen and expand incentives for individuals to give their time and money to the organizations whose missions they support?*
- *Many nonprofits struggle to access affordable and adequate insurance coverage for both health insurance and property and casualty insurance. If elected, what would you do to make insurance more affordable and accessible to nonprofits?*
- *Nonprofits possess deep community understanding, innovate solutions, and fill systemic gaps by collaborating with government agencies. If elected, what specific policies or structures would you prioritize to foster stronger partnerships between government and the nonprofit sector to address challenges effectively?*





## Support Effectively Run Elections

Voting is an incredibly local process and relies on volunteers at every stage to carry out that process. When nonprofit organizations show support for election officials and poll workers, it humanizes them, demystifies the process, encourages more engagement, and helps build public confidence in elections. In doing so, it helps to temper conspiracies and misinformation that thrive when election mechanics are not fully understood.

### Recruit Poll Workers

Poll workers are everyday community members who undergo specialized training to help administer the in-person voting process during early voting and on Election Day. These dedicated individuals work to ensure that polling locations operate smoothly and can help minimize problems such as malfunctioning equipment, closed facilities, and hours-long lines that actively discourage voter turnout. Ultimately, how a poll worker welcomes, supports, and treats a voter with fairness and dignity can shape that person's confidence in the system and determine whether they choose to vote in future elections. These positions are often paid.

### Resources

- [Election Assistance Commission: Sign Up to be a Poll Worker](#)
- [Power the Polls: Poll Worker FAQs](#)
- [Power the Polls](#): Support for poll worker recruitment
- [USA.gov: State and Local Election Offices](#)

### Connect With Election Officials

Every state must designate a chief election official to oversee elections in that state. While most often an elected position, the chief election official can be elected, appointed by the governor, selected by the legislature or could have a board or commission type structure. Elections officials administer and ensure the integrity of our democratic processes. They are the backbone of our democracy, and they work under immense pressure. Election officials now face intense public scrutiny, shifting legal regulations, and, unfortunately, high levels of harassment and threats. Despite the heightened stress, tension, and long hours, they show up to do their jobs with complete professionalism so that every eligible citizen can make their voice heard.

**Thank Election Officials.** Support election officials by directing your network to send thank-you cards or positive community messages. Consider joining in on Election Hero Day, held each October.

## Resources

- [U.S. Vote Foundation: Local Election Office Contact Information](#)
- [Center for Civic Design: Message Templates for Thanking Election Officials](#)
- [Election Hero Day](#)
- [Election Hero Day: Toolkit](#): Includes key messages and talking points, ways to celebrate, social copy and graphics, email copy, and more.

## Recruit Volunteers for Other Electoral Activities

As mentioned earlier, there are many ways volunteers can engage in elections while remaining nonpartisan—from supporting election officials and poll workers, to ensuring a free and fair election process, to supporting people waiting to vote. In certain states/localities, specific opportunities exist to do poll monitoring, help cure ballots, and more. Additionally, nonprofit organizations can provide resources and opportunities for their staff and clients to participate in their own nonpartisan way or take advantage of programs. Check your local laws and election guidelines to see if your organization can support initiatives such as:

- [Protect the Vote: Nonpartisan Election Protection Volunteer Program](#): Ensure eligible voters are able to participate in our democracy.
- [Pizza to the Polls](#): Deliver free food to people who are participating in civic life, such as those on long lines at polling places and folks at nonpartisan events focused on voter education, registration, and turnout.
- [Election Protection Volunteers](#)
  - Opportunities for legal professionals
  - Poll monitoring program
  - Ballot curing: Ballot curing is a process that allows voters to correct certain problems with their mail-in or absentee ballots (such as signature doesn't match, missing date, etc.). Ballot curing rules and timelines vary dramatically across states, and sometimes by counties within states.
    - Organizations should identify supporters in localities with ballot-curing protections and connect them with organizations that are doing ballot curing. Let them know they could be contacted on a short timeline, including same-day volunteer requests.

## Educate the Public About How Elections Work

Providing clear, basic voting information from trusted sources helps reduce confusion, address voter concerns, and instill confidence that our election process works. By encouraging community members to rely on official communications rather than rumors or speculation, trusted organizations can effectively counter misinformation and inoculate against both existing and future disinformation.

## Resources

- [How Elections Work](#): Learn what happens before the election, during the voting period, and after the election.



## Publicize the Election Protection Hotline

Ensure community members are aware of the [866-OUR-VOTE Election Protection Hotline](#) so they know where to turn should they encounter problems or have any questions while voting. Individuals can call or text the hotline to report a voting issue or connect with trained volunteers. Include the hotline number in voter guides, email and SMS programs, and social media content.

Election Protection Hotline Information

- English: 1-866-OUR-VOTE (1-866-687-8683)
- Spanish: 1-888-VE-Y-VOTA (1-888-839-8682)
- Asian languages: 1-888-API-VOTE (1-888-274-8683)
- Arabic: 1-844-YALLA-US (1-844-925-5287)
- Text: 1-866-OUR-VOTE (1-866-687-8683)
- Email: [hotline@866ourvote.org](mailto:hotline@866ourvote.org)

## Resources

- [Election Protection: Toolkit Materials](#)

## Encourage Supporters to Follow Best Practices at Polling Places

Prepare community members for a positive voting experience by reminding them to remain patient, to follow any instructions from an election official or poll worker, and to treat their fellow voters with respect. Remind community members that if they witness any voter intimidation or have other concerns, they should reach out to the Election Protection Hotline immediately.

### Key Protections

- If polls close while you're in line, you have the legal right to stay and vote.
- If your name isn't on the voter list, ask for a provisional ballot — don't leave.
- If voting machines malfunction, request a paper ballot.
- If you make a mistake on your ballot, ask for a new one.
- Your vote is private. No one has the right to see how you vote or pressure you inside the polling place.
- Voter intimidation is illegal.

## Resources

- [American Civil Liberties Union \(ACLU\): Know Your Rights: Voting Rights](#)
- [National Conference of State Legislatures: Electioneering Prohibitions Near Polling Places](#)



## Help Supporters Identify and Resist Misinformation

Provide information and resources that help supporters evaluate election information before sharing it online.

### Tips:

- Only repost messages directly from state or local election offices to avoid partisanship or misinformation.
- Use [FactCheck.org](#), [PolitiFact](#), [Snopes](#), or the [Brennan Center's election rumor tracker](#) to debunk election rumors.
- Use the [SIFT framework](#) to verify any claim about voting procedures or election results.
  - Stop.
  - Investigate the source.
  - Find better coverage.
  - Trace information to its original context.

## Respond to Interference

In the case of external interference in the election, nonprofits should follow core principles to ensure free and fair elections:

- **Amplify Verified Facts Only.** Only share updates from official state and election officials. Do not post unverified statements, rumors, or other posts regarding ballot counts or system errors.
- **Commit to Strict Nonviolence.** Center all messaging on peaceful, unified community resilience and respect for the legal administration process.
- **Call for Accountability to Ensure Votes are Counted.** It may be necessary to demonstrate unity in the call for election integrity by echoing the call for election officials to carry out legal election processes to count every vote. This is why it's important for leaders to organize and communicate with one another ahead of time: so they can quickly align messaging in the moment.

### Resources

- [Princeton University: Elevating Community Safety and De-Escalation Approaches](#)
- [Harnessing Our Power to End Political Violence](#)





## Section 6:

# Tips and Scripts for Voter Engagement



## Engaging Potential Voters in Rural Areas and Small Towns

Rural areas and small towns hold some of the nation's closest elections, but they are frequently overlooked by major parties. In many of these communities, food accessibility is scarce, healthcare access is limited, and public transportation is nonexistent. Yet, neighbors, nonprofits, and local leaders work together to build vibrant communities that are vital to our democracy. Every community, regardless of size, deserves adequate representation. **Residents are more likely to know their local elected officials and their individual vote can have more power. In local races, a handful of votes may be enough to change the outcome of an election.** And yet, most small communities continue to have lower participation rates in local elections than in federal elections.

### VOTER ENGAGEMENT STRATEGIES

Engaging potential voters in rural areas and small town communities may look different from how to engage people in cities or suburban areas. Here are a few strategies from nonprofits in rural areas and small towns:

#### Make Space for One-on-One Conversations

In rural areas and small towns, a one-on-one conversation is an effective way to engage and educate people. Making space to ask how people are doing can help meet more holistic needs and connect them to other resources.

#### Use Physical Materials to Distribute Information

Internet access is often harder to access in rural areas. Having printed voter registration forms and flyers that educate voters on the processes and candidates are a reliable way to engage voters.

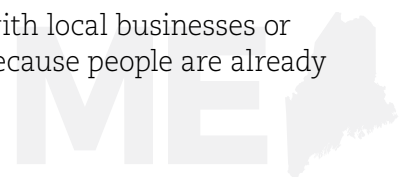
**Read about how Community Partnership Family Resource Center reaches rural communities through trusted relationships at <https://www.nonprofitvote.org/resource/community-partnership-family-resource-center-cpfrc/>**

#### Host a Meet and Greet with Local Candidates and Officials

Candidates and local officials in your small town/rural area might be neighbors you already know and work with. If people know their faces, voting becomes personal, like who they're voting for, what they actually do, and how it affects them.

#### Utilize the Trust in the Community

Organize your voter engagement around local events. Try partnering with local businesses or libraries to help increase awareness about the approaching elections because people are already going there, linking voting to something safe and familiar.



# Engaging Potential Voters with Disabilities

A disability includes any condition that significantly impacts a person's life activities. This can include matters of mobility, cognition, hearing, and/or vision. Any of these can impact the ability to vote in unique ways. **If people with disabilities voted at the same rate as people without disabilities who have the same demographic characteristics, there would be about 1.75 million more voters.** The landmark Americans with Disabilities Act of 1990 requires states and local governments to make voting more accessible to ensure that people with disabilities have a full and equal opportunity to vote in all elections. The ADA covers all parts of voting, from voter registration to selecting a location for polling places to actually voting, whether on Election Day or during an early or absentee voting process. Since then, other laws such as the Help America Vote Act of 2002 have continued these efforts. Despite this, people with disabilities continue to face barriers to voting. In 2022, voters with disabilities were three times more likely to experience some type of difficulty in voting than people without disabilities.

Strategies for making voter engagement activities more accessible:

## Use Multiple Formats in Different Mediums

Make any needed adjustments for the physical and digital space in which voter registration is done. This may mean providing information in multiple formats in various visual, auditory, and tactile mediums. For visual information and forms, you may need to provide both paper printouts and digital devices so screen readers can be utilized.

- Hosting a webinar on voting information? Be sure to turn on captioning.
- Posting an image to social media? Be sure to use the “alt tag” features.
- Using the web? Use free online tools to simplify language or check for color contrast to ensure readability.

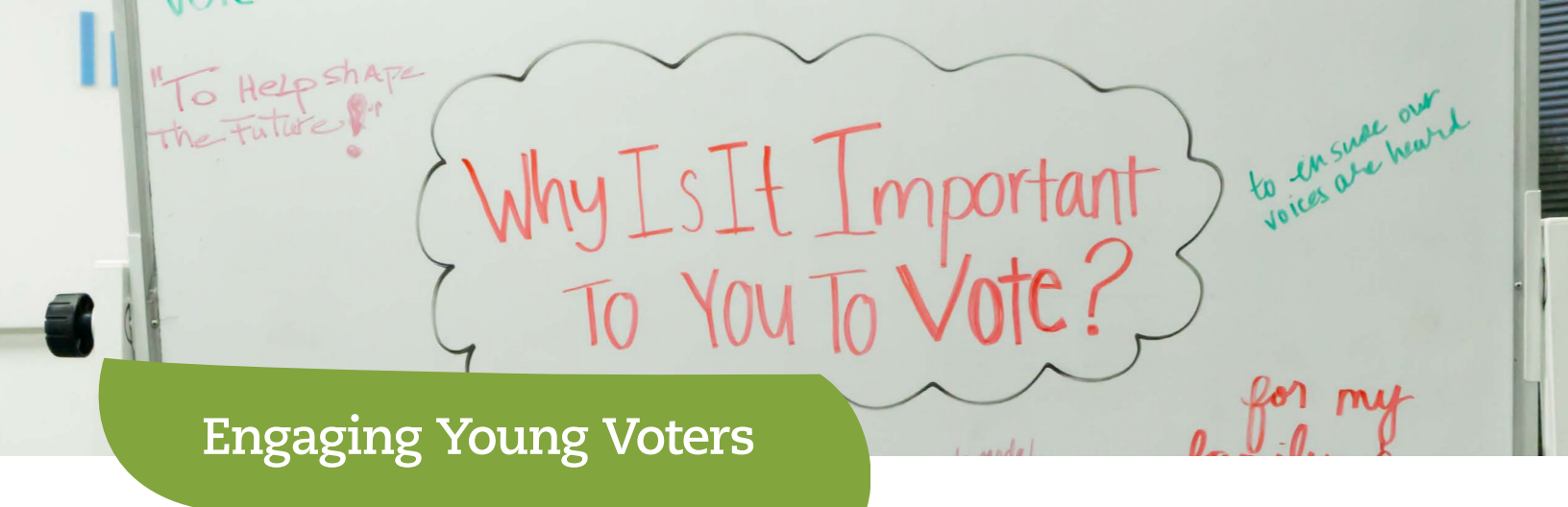
## Visualizing and Walking Through the Steps to Vote

One way to work with people with disabilities is in preparing to vote, from making sure voter information is clear and understandable to addressing potential concerns, such as: How will the voter get to the polling place? If driving, will there be accessible parking? Will the pathways to the entrance be accessible and clearly marked? How will the doors open?

- For first-time voters or if a polling place has changed, visiting the site together in advance can help to give the person a feel for the location and opportunity to identify any areas of concern.
- Any issues can be shared with the local county election office, which can be an ally in making sure accessibility requirements for polling places are met. Frame it as, “We want to help you make sure everyone can vote.”
- Try reaching out to the local election office to receive a demonstration to give people with disabilities experience with the actual voting machine that will be used.

By better understanding the full range of possible disabilities and appropriate accommodations, nonprofit staff can help address some of the barriers to voter registration and education, while maintaining dignity and independence for people with disabilities.





## Engaging Young Voters

Younger voters, especially those aged 18-29, have lower voter participation rates compared with older voters due to a variety of factors. According to research by CIRCLE and Ideas42, young people are often unfamiliar with the process of registering and voting. They may misunderstand key voting rules, such as the need to update their voter registration whenever they move or how to locate their polling place. Justice-involved youth may believe they lost their right to vote due to a misdemeanor charge (only felony convictions can impact voting rights) and students may be unsure whether they can vote in their home or school state. There are actions your organization can take to help young people feel identified with voting and empowered to participate.

### **Make the Process Clear:**

Not all young people will locate key information on an official website – or may not even know there is such a website where they can find that information. Whether printed or digitally, write out dates of various elections, the opening hours of polling places, and what ID they need to bring, if any.

### **Help Navigate the Barriers:**

Young voters may need to rearrange their work or school schedule to make it to the polls, or may need help with transportation. Help them set a concrete plan around when they will vote, how they will get there, and with whom they will go to make their participation more likely.

### **Host Youth-Friendly Events and Workshops:**

Organize events, workshops, and seminars tailored to young people, focusing on issues that resonate with them. As often as possible, include young people in planning and hosting the event.

### **Encourage Peer-to-Peer Outreach:**

Empower young people to become ambassadors for voter registration and civic engagement within their communities. This is a form of relational organizing, and it is one of the most effective ways to boost turnout.

### **Publicize Paid Poll Worker Opportunities:**

In addition to making some money, young people can get an in-depth experience with the election process and contribute to a more welcoming environment for other youth voters.

### **Additional Resources:**

[Campus Vote Project](#)

[All In Campus Democracy Challenge](#)





## Don't Forget Your Staff, Board, and Volunteers

### Encourage Everyone to Vote

In our zeal to register people to vote in our communities and at events, it's easy to overlook those closest to us: our staff, board members, and volunteers. Their voices deserve to be heard at the ballot box, too. Intentionally reach out to them to make sure they're registered, invite them to the nonpartisan voter education events you host such as candidate forums or sessions explaining ballot measures, provide them with information about how, when, and where to vote, and encourage them to vote with a reminder that they are important to you. Even a small nonprofit can have a mighty impact on voter turnout by leveraging the power of our most natural, closest connections.

### Give Paid Time Off to Vote

Inability to take time off to vote (or not being aware of time off to vote policies) can be a barrier for potential voters. While nearly half of states require employers to offer paid time off to vote, the rest do not. Offering unpaid time off to vote can also help but makes employees choose between voting and their paycheck.

Nonprofits can make a difference by leading with policies that ensure all employees have access to the ballot box. Make sure each employee is aware of your policy for time off to vote. In addition to publicizing election deadlines, nonprofits can help staff make a plan to vote, and generally encourage a culture of voting.

### The Standard Elements of Any Time-Off-to-Vote Policy Include:

- A statement of support for active and engaged citizenship;
- The number of hours granted, usually two hours with pay;
- Time off granted conditioned on the employee not having time to vote before or after work on Election Day, not able to use or access an absentee/mail ballot, or not able to vote early; and
- A requirement that the employee notify their supervisor before Election Day.

See sample policies and state requirements for time off to vote at [nonprofitvote.org/nonprofit-staff-vote/](https://nonprofitvote.org/nonprofit-staff-vote/).



# Organizational Staff or Volunteer Voter Engagement Sample Email

## Sample Email

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| <p><b>Subject Line</b></p> <p>Register to Vote for the Upcoming Election</p> <p><b>Email Draft</b></p> <p>Dear [Name]</p> <p>We at [Organization Name] are asking all our staff, board members, and volunteers who are eligible to make sure you are registered to vote. You are important to us and our community, and we want to make sure that your voice is heard in the upcoming (and future) elections.</p> <p>If you're already registered, now is the time to make sure your official voter registration information is up to date at your current address. Our goal is to have 100% of eligible staff, board, and volunteers registered by the week of National Voter Registration Day [Insert Date]. Will you help us reach that goal?</p> <p>When we ask elected officials to support our issues and funding for services like ours, having our staff, board, and volunteers be registered voters makes our voice that much stronger. [Insert org. specific or election-specific information].</p> <p><b>Option 1: Direct</b></p> <p>[Employee Name] will be coming around the office with registration forms asking you if you need to register or update your registration [Insert timeframe]. They can help you fill it out and return it. They will also have information about upcoming election dates and options for how to vote.</p> <p><b>Option 2: Indirect</b></p> <p>You can learn more about registering and voting using [Organization's registration tool of choice].</p> <p>We appreciate your service to [Organization Name].<br/>Thank you for being a registered voter!</p> <p>Sincerely</p> <p>[Insert Sender]</p> | <p><b>Ask:</b> Include an ask, goal and a date or timeframe.</p> <p><b>Why:</b> Note importance to your organization and community.</p> <p><b>How:</b> Highlight registration activity or how to get registered.</p> <p>Thank you.</p> |



## Section 7:

# Philanthropy for Voter Engagement Tools

# Practices for Trust-Based Philanthropy in Voting

**I would encourage foundations to trust the organizations that they're funding. There's a lot of hesitation about legality and what's allowed. Do your due diligence – trust and verify.**

– Sapelo Foundation

- **Provide multi-year general operating support grants:** Investing for the long run means allowing grantees the flexibility to invest in the programs, systems, and capacities they need to move forward their long-term goals. For voter engagement funders, this often means having a shared vision for the future of democracy and improving representation among key communities, building relationships with grantees, and trusting their knowledge base, the challenges and opportunities they see to engage their community, and their ability to shift their work as necessary to address emerging needs.
- **Support beyond the grant:** Many funders named that providing the grant is just the beginning. Funders offer capacity building support through training and additional grants to help organizations continue to grow their impact. For voter engagement funders, this has included connecting grantees to Nonprofit Vote and Bolder Advocacy resources to understand the ways they can conduct voter engagement work, along with training on voter data and tools.
- **Be guided by grantee partners:** Grantee organizations are on the frontlines of the work and should be part of the information gathering process that informs foundation strategies. Be in conversation with partners to understand the current environment, what's working and not working, and what approaches or investments are needed. Voter engagement funders use townhalls, convenings, and grantee informed strategic planning processes to be responsive to the needs that emerge from the community in setting the priorities and parameters of their voter engagement programs.
- **Leverage the foundation's risk capital:** Foundations have unique positioning in their communities to convene leaders, invest in new ideas, and take bold action. Voter engagement funders have leaned into opportunities to convene elected leaders to discuss policy goals, explored ways to activate new funding tools to expand the type of voter engagement funding they can provide, and invest in emergent initiatives to support voter engagement infrastructure. Many foundations report that what allows these explorations to be successful is having board and executive leadership who sees new frontiers as bold opportunities to meet the organization's mission.
- **Reduce burden on grantees:** Foundations can minimize the application and reporting process for their grantees. For voter engagement funders that might mean having a call with a prospective grantee to understand their priorities for the upcoming election cycle rather than requiring a formal application or allowing grantees to submit a video that breaks down their approach. Some funders have eliminated reporting requirements or have set up convenings for grantees in lieu of reports that enable organizations to learn from each other rather than invest time in reporting that only the funder will see.





## Building Out a Voter Engagement Grants Program

Voter engagement grants can take many forms, from smaller, supplemental grants to existing grantees to integrate voter engagement into the client and community outreach work they are already doing, to more robust voter engagement grant programs with open RFPs targeting groups already working in the voter engagement space. Below are a sampling of such grant-making approaches. Consult the legal guidelines here in developing your program.

- **Jefferson Regional Foundation** awarded mini grants awarded nonprofit organizations to conduct voter engagement work. A total of 13 organizations received \$1,000 each to host voter registration events, canvass, transport residents to the polls, and to conduct outreach aimed at increasing voter turnout.
- **New Hampshire Charitable Foundation** launched a voter outreach pilot program that provides grants to community-based organizations for the purpose of increasing local civic engagement and participation in nonpartisan voter outreach activities, with a special focus on BIPOC and other historically under-represented populations. In 2022, the foundation invited grassroots groups to apply and supported eleven groups – some with no prior history of doing voter outreach. One example from their pilot year was a community-based organization that primarily provides after school sports programming and family and caregiver supports. With foundation funding, the organization, a trusted and known entity in the community, was able to add nonpartisan voter outreach work into their existing programming.
- **The Ruth Mott Foundation** launched a Civic Participation Fund, in partnership with United Way of Genesee County and Community Foundation of Greater Flint. The Ruth Mott Foundation has invested \$30,000 through the fund to support civic engagement. The fund has supported 13 organizations and the foundation intends to invest again in the fund, which has a goal of growing and attracting contributions from outside of the local community to support voter education and voter participation in Flint.
- **The California Community Foundation** launched the PIVOT Power Building Pooled Fund which aims to raise \$10-15 million to be spent over the next three years (2023-2026) to support California's key power building innovations and infrastructure. Specifically, the fund will focus on infrastructure for organizing, narrative communications, and independent revenue generation. CCF serves as a steering committee member and their former civic engagement program officer serves as the director of the fund.





## Strategic Plan Examples



Through their strategic planning work, many foundations have articulated the clear connection between their mission and voter engagement and civic life. Including voter engagement as part of priorities and outcomes sets a tone for the organization, can align programs and resources, and communicates the importance that participation plays in achieving mission-aligned outcomes.

### **Episcopal Health Foundation 2018-2023 Strategic Plan**

The Episcopal Health Foundation's plan includes an outcome that "community and congregation members actively shape healthy communities and influence health systems to improve health equity." A core strategy to achieve the outcome is to support organizations to elevate the voice of community members to influence community health:

We will work with community organizations that are interested in and capable of engaging community members, particularly low-income and vulnerable populations, to become advocates for health. Our primary mechanisms for advancing this strategy include technical assistance to help organizations learn how to do meaningful community engagement work and financial support to organizations that work actively and effectively with community members.

Examples of work within this strategy include increasing the number and reach of grassroots community organizing groups that advocate for community health; supporting the development of new leaders within communities; ensuring that client-facing community partners have the skills and resources they need to actively engage those they serve as influential beneficiaries; developing new and strengthening existing health coalitions; and supporting community organizations in using hospital community benefit data to encourage investment in social determinants of health.

### **Fairfield County Forward: Fairfield County's Community Foundation's 2022 Strategic Plan**

The Fairfield County Community Foundation developed a strategic plan that evolves its approach to philanthropy. The plan set out intentions to embrace trust-based approaches to grantmaking and community leadership and to work with the community on three goals:

1. To understand and acknowledge racial history;
2. Create a shared affirmative vision of a fair, antiracist, inclusive society; and
3. Build civic, cultural, economic, and political power for those most impacted by inequities and injustices in our current systems.

The inclusion of civic and political power undergirds the Foundation's priorities to invest in voter engagement.





## **Together We Thrive: New Hampshire Charitable Foundation Strategic Plan for 2022-2027**

As part of its strategy to focus on equity, racial justice, and economic security, the New Hampshire Charitable Foundation outlined five priorities including civic health.

Under civic health, the foundation aims to

- Work with partners to identify leverage points for the Foundation’s advocacy, communications, convening power and grantmaking to address polarization, misinformation and other forces that threaten our democracy. We will invest in efforts to expand leadership by and representation of people of color.

## **The Sapelo Foundation 2020-2025 Strategic Plan**

The Sapelo Foundation celebrated its 70th anniversary, outlining a new strategic plan to guide its work. Among the strategic priorities were two goals:

- Catalyze systemic change through power-building strategies of policy advocacy, civic engagement, and grassroots community organizing. A just Georgia requires changes to the policies and practices that have oppressed marginalized communities, and power is built among those communities. We support promising efforts focused on strategies of policy advocacy, civic engagement, and grassroots community organizing, which result in tangible systemic change and power building.
- Support marginalized communities—particularly communities of color—so they are included in and benefit from the creation and implementation of just policies and practices. A just Georgia requires that we engage and lift the voices of those whose participation in our democratic society has been systematically denied—in particular, communities of color. We support efforts that meaningfully engage marginalized communities in the pursuit of systemic change.





## Survey Tool to Assess Grantee Voter Engagement Priorities

### Contact Information

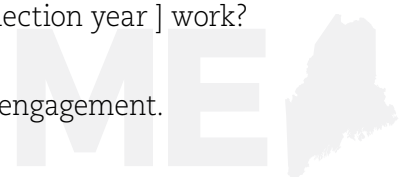
1. Name of Organization:
2. Fiscal Sponsor (if applicable):
3. Person completing survey:
4. Email:
5. Executive Director:
6. Executive Director Email:

### About Your Voter Engagement Program

1. Please select the race & ethnicity of your target voter population(s):
  - Asian
  - Black/African American
  - Indigenous
  - Latinx
  - Middle Eastern & North African
  - Native/Tribal
  - Native Hawaiian & Pacific Islander
  - Other (please specify)
2. Based on PREVIOUS electoral programs, what areas in [ indicate region ] have you been able to reach? Please list below.
3. For this UPCOMING electoral program, what areas in [ indicate region ] are you intending to reach? Please list below.
4. Please outline your [ insert election year ] voter engagement plans in 3 bullet points.
5. Will your voter engagement program be addressing any local or state ballot measures? If so, please specify.

**For private foundations, please reference guidance on ballot measures.**

6. Does your organization have a fundraising gap for your [ insert election year ] work? If so, please specify.
7. Anything else we should know about your [ insert election year ]:engagement.





## Grant Agreement Template

A grant agreement that bars all “political activities” can unnecessarily limit nonprofits. The Internal Revenue Code only prohibits “partisan political activities” that support or oppose candidates. It does not prohibit election activities conducted on a nonpartisan basis. Not specifying “partisan” creates confusion among nonprofits as to whether or not they can carry out even fully allowable nonpartisan voter activities such as voter education or candidate forums commonly undertaken as part of the sector’s longstanding commitment to active civic engagement.

Further, the IRS does not require either private or public foundations to include a statement related to partisan political activities at all. It’s sufficient to state funds should be used solely for charitable and educational purposes as outlined in the Internal Revenue Code.

**Grant Agreement Templates for Private Foundations:** The following grant agreement templates were developed by the Council on Foundations and Center for Lobbying in the Public Interest, a program of the National Council of Nonprofits, with the assistance of Marcus Owens, director of the IRS Exempt Organizations Division (1990–2000):

- **Grant Template with Language Prohibiting Partisan Political Activity**

Key language in template: “No funds may be used for partisan political activities, which are prohibited under Section 501(c)(3). However, the grantee may engage in any voter education and voter engagement activities conducted on a nonpartisan basis.”

- **Grant Template Without a Specific Partisan Political Prohibition**

Key language in template: “Grant funds will be used solely for charitable, religious, scientific or educational purposes as described in Section 170(c)(2)(B) of the Internal Revenue Code.”





## Training and Convening Voter Engagement Partners

### Blue Shield of California Foundation

One of Blue Shield of California Foundation's major grantmaking areas is domestic violence and the Foundation has made core support grants to every one of the nearly 200 domestic violence shelters in California. Blue Shield has offered an added benefit to all grantees through a partnership with Alliance for Justice to make their Bolder Advocacy webinars and training materials available for free. The trainings cover topics that include advocacy and voter engagement and allow grantees to access resources that help deepen the impact of their work. Blue Shield of California works with Alliance for Justice to develop the training schedule and sends a quarterly email to all grantees with the dates and reminders about this free resource.

### California Community Foundation

In 2022, the California Community Foundation (CCF) hosted four trainings leading up to the June primary and another four training sessions leading up to the November General Election on topics including script writing for voter contact, how to conduct volunteer recruitment, how to navigate voter data and software tools, and a session about the rights of voters in partnership with the Los Angeles County Registrar. CCF partnered with other local grantmakers, including the Weingart Foundation, Liberty Hill Foundation, the United Way of Greater Los Angeles, and California Wellness Foundation, to invite their grantee partners and extend the reach of the training. The training sessions were successful and CCF relaunched them in 2023.

To deepen the impact of the trainings and inform their grantmaking strategy, CCF sent a survey to attendees asking them about their electoral plans. The majority of organizations responded that they needed \$10,000 to 20,000 for their voter engagement programs. CCF collaborated with training session partners Weingart Foundation and Liberty Hill Foundation to provide \$5,000 to \$25,000 grants to 15 organizations to fill budget gaps.





### **Episcopal Health Foundation**

In collaboration with representatives from the Episcopal Church, Texas League of Women Voters, and Texas Impact, Episcopal Health Foundation, EHF hosted a training that provided information to congregations about ways to educate and engage community members to vote in the upcoming election. The session covered resources available through the Episcopal “Voting Faithfully” campaign, ways to engage vulnerable populations to vote, and recruiting election workers. In addition to the training, a workshop at their sixth annual In Common event shared ways for attendees to educate themselves and others about current elections and nonpartisan ways to encourage voting in the community.

### **Fairfield County’s Community Foundation**

Fairfield County’s Community Foundation’s Center for Nonprofit Excellence provides education and tools to help nonprofits grow and thrive. The center provides training to more than 600 organizations on topics ranging from grant writing, data storytelling, board effectiveness, integrating an equity mindset, and nonprofit management, among other topics. The Center serves as a space to support nonprofits with ways to deepen and expand their efficacy.





## Common Strategies

### Communications Campaigns that Get Out the Vote

Create a communications strategy that informs the community and grantees about upcoming elections and how to vote. This can include building a page on your foundation website with key election dates; information about where and how to vote; and links or phone numbers for the registrar, board of elections, and/or Secretary of State. Create an easy-to-use toolkit with social media posts and graphics to share with grantees and other partners to spread the word within their own communities. View [sample](#) content to include in your communications campaign.

### Training and Convenings

Bring your grantees together for training on topics such as staying nonpartisan, effective voter outreach, using data, technology, and tools to engage voters, and approaches to reach communities with voting information. Create a space for shared learning, exploration, brainstorming, and collaboration. Don't worry about having all of the answers and knowledge – invite experts, trainers, and advisors to inform programming on specific topics, or promote trainings organized by others. View [examples](#) of ways that foundations have organized training and convenings for their partners.

### Grantmaking

Directly support voter engagement activities. This can be done through supplemental grants to existing grantees to build out voter engagement programs for their respective communities. Whether food pantries, health centers, or family service agencies, these groups and the communities served will be stronger as a result of greater voter participation. Alternatively, build out a stand-alone grants program to support groups doing voter engagement work within given communities. View more [examples](#) of ways foundations have built voter engagement grant programs.

### Investing in Voting Ecosystems

Support collaborative networks that convene, organize, and build shared strategy among community-based organizations that are invested in improving voter engagement. View these networks as a way to build the backbone of the local voter engagement infrastructure.

### Research that Informs Strategy

Conduct or collaborate on research that aims to identify voting and civic gaps. Use that research to ask questions about what's needed to engage the community and inform the approach for investing in strategies to improve voting engagement.



## Legal Guidelines to Inform Your Voter Engagement Programming

*Provided by Adler & Colvin, a group of seasoned attorneys in San Francisco deeply committed to serving the legal needs of the nonprofit sector nationwide. These Guidelines summarize information for educational purposes, and are not intended as legal or tax advice. Consult a qualified attorney concerning the application of the law in any specific factual situation.*

Private and community foundations can use their resources to strengthen democracy and invest in voter engagement to support nonpartisan efforts that give voice to the communities they serve.

Foundations can directly conduct, and provide grants to nonprofit organizations to support, a wide range of nonpartisan election-related activities to educate voters and candidates and increase voter engagement and participation. With the exception of prohibiting private foundations from conducting or supporting certain voter registration drives, the Internal Revenue Code places no limit on the amount of nonpartisan, election-related activities a foundation may conduct in pursuit of its charitable or educational purposes.

### **Foundations can Participate in Both Candidate Elections and Ballot Measure Campaigns:**

1. **Candidate Elections:** Foundations can support or promote a wide range of nonpartisan voter engagement, voter education, and candidate engagement activities as long as they do not support or oppose candidates or political parties; and community foundations can support and conduct nonpartisan voter registration drives. Private foundations can support voter registration drives that comply with additional rules discussed below.
2. **Ballot Measure Campaigns:** Foundations can conduct voter engagement and education on ballot measures, including initiatives, referendums, and bonds, subject to the rules governing lobbying under Section 501(c)(3) discussed more fully below. However, unlike community foundations, private foundations cannot deploy their resources, directly or through earmarked grants to others, to oppose or support ballot measures, except in the limited circumstances described below.



## Candidate elections

While foundations can support a wide range of nonpartisan voter education, candidate engagement, and get-out-the-vote activities, Section 501(c)(3) prohibits all charities, including private and community foundations, from engaging in activities that support or oppose any candidate, or group of candidates such as a political party, for election to public office.

Being nonpartisan means a foundation cannot endorse or contribute to any candidate campaign nor engage in any communication, conduct, or use of resources that favors or disfavors a specific candidate or party. This includes activities such as rating candidates or labeling them with arguably partisan identifiers such as “pro-choice” or “anti-tax.”

The safest strategy is to make no reference to any candidate or party except in the context of carefully-designed and -implemented nonpartisan educational activities where multiple candidates are presented, or in a context completely separate from any election, such as attempting to influence an incumbent’s performance as an officeholder.

*For example, a foundation can stay nonpartisan by inviting all viable candidates for a city council office to participate in a voter education forum or to respond to a questionnaire about where they stand on a range of key issues, and publishing their responses without editing or commentary.*

A foundation can provide information on voting or encourage greater voter participation by any community or demographic of people chosen without regard to political affiliation or candidate preference provided it avoids partisan content and acts independently from any candidate or political group.

*For instance, a foundation can provide targeted grants to engage new, first-time voters within the Asian American and Pacific Islander communities, or alternatively, voters from an underrepresented, largely Black community in the foundation’s service area. Demographic targeting does not in itself constitute partisan activity.*

Further, private and community foundations can educate voters about the candidates by using or funding unbiased, even-handed methods such as nonpartisan debates, forums, questionnaires, voter guides, news reporting, social media, and web links in accordance with IRS guidance.<sup>[1]</sup> Organizations like Nonprofit VOTE and Bolder Advocacy are available to provide support, information, and guidance on how to provide voter education resources.

## Private Foundations and Voter Registration Drives

One thing private foundations cannot do easily however, that community foundations can, is conduct or fund a voter registration drive targeted to a specific time or place. A private foundation that wants to conduct or fund a voter registration drive can do so only by making a grant to an organization recognized by the IRS as meeting very specific qualifications, set forth in Section 4945(f) of the Code, such as conducting its registration drives in five or more states and across multiple election cycles. However, these rules only apply to private foundation grants earmarked or specifically for the purpose of funding a voter registration drive.

**General Support or Project Grants:** A private foundation may provide general support grants or project grants to an organization that conducts voter registration drives, provided the grant is not earmarked for specific voter registration activities or outcomes. In such cases, the charity may use some or all of the grant for voter registration work, provided there is no oral or written expectation that funds be used for voter registration.<sup>[2]</sup>

For more, see [Bolder Advocacy’s fact sheet](#) on Voter Registration Rules for Private Foundations.



## Ballot Measure Campaigns

About half the states and many localities have ballot measures by which voters may directly approve new laws via public elections. Section 501(c)(3) expressly authorizes public charities (but not private foundations – see below ) to engage in activities designed to influence the outcome of legislation, including ballot measures, provided that such activities do not constitute a “substantial part” of the charity’s overall activities.<sup>[2]</sup> This federal tax restriction affects only laws passed by legislatures or voters in a ballot measure, not other forms of government action like regulatory, administrative, or judicial decisions. Expenditures to support or oppose a ballot measure may also require reporting under state or local campaign finance laws.<sup>[3]</sup>

Being a public charity, rather than a private foundation, means that a community foundation can, if it chooses and within its lobbying limits, reflect a view in a ballot measure campaign as a lobbying activity. A community foundation can also engage in any other kind of activity related to a ballot measure, without limit, so long as the activity is charitable or educational and does not reflect a view on the ballot measure, and therefore does not constitute “lobbying” as defined for federal tax purposes.

To determine how best to accomplish its goals and remain nonpartisan, a community foundation seeking to fund voter engagement activities should consult knowledgeable counsel as well as learning from the content of this toolkit and suggested resources.

## Private Foundations and Ballot Measures

Unlike community foundations, private foundations cannot directly support or oppose ballot measures, and cannot earmark grants to do so. For measures placed on the ballot by citizen petition, the law allows private foundations (and other charities) to discuss the subject of the measure, and even express a view about it, until signature petitions begin to circulate. Before that moment, a potential ballot measure is not considered “specific legislation” for federal tax purposes, and referring to it is not lobbying. Once petitions begin to circulate, however, the measure becomes “specific legislation”, and a communication that refers to and reflects a view on the measure thereafter will constitute lobbying unless the communication fits within the exception for “nonpartisan study, analysis, and research”.<sup>[4]</sup>

A private foundation cannot “earmark” funds for lobbying, including lobbying on a ballot measure. However, the Code provides two safe harbors within which a private foundation can make a grant to a charity that lobbies (on a ballot measure or other legislation), without adverse tax consequences for the foundation. A grant properly made under either safe harbor need not prohibit the use of grant funds for lobbying.<sup>[5]</sup>

**General Support Grant:** A private foundation grant that provides “general support” to a public charity that the grantee is free to use for any of its activities will not be considered “earmarked” for lobbying, even if the grantee chooses to spend grant funds to support or oppose a ballot measure.<sup>[6]</sup>

**Specific Project Grant:** A private foundation grant that supports a specific project that includes lobbying will not be considered “earmarked” for lobbying if the amount of the grant does not exceed the non-lobbying portion of the specific project budget.<sup>[7]</sup>

[1] Guidance from the IRS on how to conduct these activities on a nonpartisan basis is in Revenue Rulings 2007-41, 80-282, 78-248, and 76-456.

[2] Some foundations may prefer to use the definitions and percentage limits of Section 501(h) to govern their ballot measure and other lobbying expenditures. Those rules treat a public charity’s communications, conduct, or expenditures supporting or opposing a ballot measure as direct (not grassroots) lobbying of voters in their capacity as legislators that provide higher and more defined spending limits.

[3] Guidance from the IRS on how to conduct these activities on a nonpartisan basis is in Revenue Rulings 2007-41, 80-282, 78-248, and 76-456.

[4] Further discussion of campaign finance requirements related to ballot measures is beyond the scope of this Toolkit. Community foundations should consult with campaign finance counsel and each relevant state or local campaign finance office before starting any activity that could be subject to these rules.

[5] A private foundation considering reliance on either of the safe harbors should consult knowledgeable counsel before making any such grant

[6] Whether the grant is for general support depends on the specific facts and circumstances of the grant.

[7] Funders seeking the protection of this safe harbor should consult knowledgeable counsel in advance about how to safely implement this device.



## Additional Resources

### General Resources:



**Nonprofit VOTE** – Get webinars, factsheets, and support for nonpartisan voter engagement.



**National Council of Nonprofits** – Learn more about nonpartisan ways nonprofits can and do promote voting and community engagement, how to take the 501(h) election, and the many benefits of doing so.



**Bolder Advocacy/Alliance for Justice** – Find answers to questions about nonpartisanship through their library of factsheets or by contacting their technical assistance team.



**National Conference of State Legislatures** – Learn even more about election issues, including 50-state surveys on state laws, legislation databases, podcasts, and webinars.

### Nonpartisan Voter Information (National):



**Vote.gov**: National governmental website for the most direct access to accurate voter registration and election information.



**Vote411**: Provided by League of Women Voters, a decades-old organization providing nonpartisan voter information.



**BallotReady**: See what is on your ballot ahead of election time.



**Ballotpedia**: Election Information, current and historical.

### National Civic Holidays:

**National Voter Registration Day**

**National Voter Education Week**

**Vote Early Day**

