



UNITED PHILANTHROPY FORUM
**CONGRESSIONAL
RECESS GUIDE**

SUMMER 2023



UNITED PHILANTHROPY FORUM
DISTRICT *to* D.C.
Advocacy Network



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Congressional Recess Guide 2023

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Introduction

Timing of Summer Recess 2023

- United States Senate is in [recess](#) from **July 29 to September 5, 2023**.
- United States House of Representatives is in [recess](#) from **July 29 to September 12, 2023**.

The District to D.C. Advocacy Network harnesses the power of the Forum network and its nearly 100 philanthropy-serving organization (PSOs) members, creating an active culture of sector public policy engagement from coast to coast by mobilizing and engaging thousands of PSO professionals, foundation leaders, and sector advocates on public policy issues in a coordinated and collaborative fashion.

With a focus on strengthening the sector's ability to participate in the advocacy process, the District to D.C. Advocacy Network seeks to amplify philanthropy's voice on Capitol Hill, in district offices, and in state capitols across the country, addressing and supporting the needs of the sector and communities we serve.

As a sector leader and advocate, your advocacy engagement is critically important to ensuring that the needs of communities and the impact of the philanthropic sector are represented in federal legislation, administrative policies, and agency regulations.

Every August, Members of Congress return to their states and home districts, meet with constituents, host town halls, and attend local events. The summer Congressional recess is an excellent opportunity to mobilize the Forum's District to D.C. Advocacy Network by meeting with elected officials in-district and informing them about sector legislative priorities, which will be covered in this guide.

This guide has been developed to provide essential information on key Forum Public Policy Priorities, suggested talking points, tips to help prepare for in-district meetings, and grassroots and social media engagement techniques that can help amplify your asks to legislators and bring attention to your advocacy efforts.

Suppose you cannot arrange a meeting or attend an event in August. In that case, Members are scheduled to be back home at other times this fall, such as Philanthropy Day of Action on October 4th, and these policy issues will still be very relevant.



How To Use This Guide

- Review the Forum’s public policy priorities and other key sector-related advocacy initiatives to help prepare you for engaging with legislators in-district.
- While we have provided talking points on the bipartisan Charitable Act, feel free to select the issues you want to discuss that are the most important to your members and highlight ways it impacts the communities you serve.
- Successfully engage with Members of Congress and their staff and continue to cultivate key relationships.
- Build on the impact of your advocacy and broaden your audience through grassroots and social media engagement.

Important Links

The following links and resources can help you find contact information and effectively communicate with lawmakers and their staff.

- Find your legislators and contact information for their scheduler at www.house.gov and www.senate.gov.
- Use this [template letter](#) to write meeting requests with lawmakers.
- Review the [Members of Congressional Tax Committees](#) spreadsheet to determine if your legislators sit on Senate Finance or House Ways and Means Committee.
- Compare your leave-behind packet to these [examples from Foundations on the Hill](#).

Public Policy Priorities

To support your meetings with legislators and staff, this guide includes an overview of the Forum's key [Public Policy Priorities](#) and sector-related issues lawmakers will consider over the recess period and when Congress reconvenes.

- **The Charitable Act:** The Forum supports the bipartisan [Charitable Act](#) (S.566 / H.R. 3435) legislation that would restore a universal charitable deduction (UCD) for tax years 2023 and 2024. The bill would strengthen giving at a time when charitable contributions [have been declining](#). It would also provide a tax deduction to the roughly 90 percent of taxpayers who don't itemize their returns and incentivize middle and lower-income households to raise up to \$17 billion more per year for the sector.
- **Sector Regulation:** The Forum understands the important role that Donor-Advised Funds (DAFs) play in charitable giving. Our member network of nearly 100 PSOs representing more than 7,000 foundations is vital to any discussions regulating DAFs. During the previous Congress, the Forum sent a [sector letter](#) to Congressional leaders about the need to involve the broad charitable sector in discussions about legislation that impacts the sector.
- **Maternal Health:** Maternal mortality rates in the United States [have been increasing, and there are disparities](#) in maternal mortality between Black mothers, other mothers of color, and their white counterparts. The [Black Maternal Health Momnibus Act](#) would tackle this crisis through historic investments that comprehensively address the drivers of maternal mortality, morbidity, and disparities in the United States.
- **Voting Rights:** The Forum recognizes that the well-being of all Americans, and all communities, is inextricably linked to their ability to exercise their right to vote. During the previous Congress, the Forum [issued a sector letter](#) in support of the John Lewis Voting Rights Advancement Act, though the Senate did not pass the bill. During this Congress,
 - The [Freedom to Vote Act](#) has been reintroduced and seeks to protect elections from voter suppression, and
 - Representative Terri A. Sewell (D-AL), ranking member of the House Administration Subcommittee on Elections, has announced plans to reintroduce the John Lewis Voting Rights Advancement Act in September.
- **The Nonprofit SEAT Act:** The [Nonprofit Stakeholders Engaging and Advancing Together \(Nonprofit SEAT\) Act](#) has been introduced in the House. This bipartisan bill would establish formal structures and policies to leverage nonprofits' knowledge, trusted status, and reach. The Forum supports the nonprofit sector's ability to help the government and the broader social sector work together more effectively in pursuit of shared goals that uplift communities across the country. The Nonprofit SEAT Act makes this possible.
- **The Farm Bill:** [The Farm Bill](#), which is set to be reauthorized in 2023, is the most significant piece of legislation Congress enacts that has a direct impact on farmers' livelihoods, how food is

produced, what kinds of foods are grown, and how economically distressed families and children eat. It will be a priority for lawmakers after the Congressional recess. The Forum supports a Farm Bill that addresses racial and economic inequities in the US food and farming systems.

- **Census Reform:** United Philanthropy Forum supports a fair and accurate census count and legislation that reforms inequities in the counting process. Accurate census data are an essential foundation for fair political representation and the fair allocation of government resources at the national, state, and local levels.

The Value of Philanthropy

In addition to communicating about specific issues, building relationships with lawmakers and educating them about the role of philanthropy and its impact on constituents are an evergreen component of the Forum network's public policy work. Below, you'll find key talking points about philanthropy that may be helpful in your outreach with legislators during this Congressional recess period.

Philanthropy Is Valuable to Our Country

- The tradition of American generosity has a vibrant, unique history and is a big part of what distinguishes America from the rest of the world. Giving in our country is ever-evolving and deeply intertwined with the American story. Americans gave \$499 billion to charities in 2022 to help their communities.
- While \$499 million is a substantial number, it failed to keep up with inflation, and the number of donors shrank by 7%. Total giving declined 3.4% in current dollars – down 10.5% after adjusting for inflation – from a revised total of \$516.65 billion in 2021. This drop in donors is concerning to us.
- The charitable sector works alongside, but separate from, the government and business institutions. This allows citizens to freely choose how to make society a better place through their initiatives, including those that help communities impacted by inequitable public policy.

Philanthropy as a Collaborator

- Philanthropy offers more than just grantmaking. We convene organizations, facilitate collaboration, share knowledge, and pool resources. The charitable sector plays a valuable and vital role in collaborating with the public sector to leverage public investments and ensure a healthy democracy.

Public Policy & The Philanthropic Sector

Philanthropy Seeks to Promote a Strong Sector and Advocate for Vibrant, Healthy, & Equitable Communities

- The future of American generosity is not guaranteed. Public policy is crucial to preserving the spirit and capacity of American generosity and eliminating systemic and structural inequities that persist.

- The charitable sector supports policies that encourage and protect giving, lead to equitable outcomes for communities across the country, and strengthen democracy.
- We seek Congress' support on policies encouraging giving, strengthening the nonprofit sector, addressing inequities, allowing us to focus on our charitable missions, and effectively utilizing our resources to maximize our impact.
- As proposals impacting the sector are being considered, know that we are a resource to your office. Please reach out to understand the full impact proposals will have on our work, grantmaking, and the communities we serve.

Public Policy Issues and Talking Points

Priority Issue: The Charitable Act

This August, one of the Forum's key [Public Policy Priorities](#) is the Charitable Act, which would reinstate the UCD. With this legislation introduced in the Senate and House, the Forum network and philanthropic sector have a unique opportunity to call on Congress to pass the Charitable Act.

Background

Since 1917, the federal charitable tax deduction has provided a tax deduction for donations made to nonprofit organizations by taxpayers who itemize their tax returns. However, less than 10% of taxpayers itemize their returns, meaning that most taxpayers do not receive the benefit of a tax deduction for their charitable giving.

Legislation

On March 1, 2023, Senators James Lankford (R-OK) and Chris Coons (D-DE) introduced [the Charitable Act](#) (S. 566). The *Charitable Act* would restore the non-itemizer charitable deduction to one-third of the standard deduction. In 2023, this change would allow taxpayers who don't itemize to claim a deduction for charitable giving up to approximately \$4,600 for individuals/\$9,200 for joint filers, in addition to claiming the standard deduction itself. The deduction in the bill would be in effect for taxable years 2023 and 2024 and indexed for inflation.

On May 17, 2023, Representatives Blake Moore (R-UT), Danny K. Davis (D-IL), Michelle Steel (R-CA), and Chris Pappas (D-NH) [introduced the Charitable Act in the House](#). [H.R.3435](#) is an exact companion to the Senate version.

Both bills have received support from Members on the Committees of jurisdiction (Senate Finance Committee and the House Ways and Means Committee) and are poised to be considered at the end of the year if we can generate enough momentum.

Talking Points

- **Charitable giving works and is good tax policy.** Generous Americans gave roughly \$499 billion to charity in 2022. Charitable dollars are essential to maintaining a healthy civil society and vital to both nonprofit charities and local governments that depend on these resources to achieve their critical missions. The charitable deduction is good tax policy – a simple calculation shows that those in need receive at least \$2.50 in benefits for every \$1 of tax cost. This is an impressive return on investment.
- **Small charitable gifts increased after the temporary universal charitable deduction was enacted.** In March 2020, Congress enacted a \$300 charitable deduction for cash gifts from nonitemizers for 2020, and in December 2020, it extended its availability through 2021 and increased the cap to \$600 for joint filers. Thereafter, the number of small gifts – especially those of \$300 and \$600 – significantly increased.
- **While gifts of smaller amounts increased in 2020 and 2021, overall giving trends have not kept pace with inflation.** According to the 2023 Giving USA report, total giving reached \$499.33 billion in 2022, but when adjusted for inflation, this [was a 10.5 percent decrease compared](#) to 2021. Individual giving declined 13.4 percent when adjusted for inflation, totaling \$319.04 billion.
- ***Include personal anecdotes and data from your members:*** Collect data and stories from your members about how the decrease in donors and donations has negatively impacted their work and the communities they serve.

Philanthropy Day of Action (SAVE THE DATE)

Your engagement during Congressional Recess will serve as a springboard that leads up to a broader advocacy campaign culminating in a **Philanthropy Day of Action on October 4, 2023**.

Leading up to that day, the Forum will guide advocacy efforts to encourage Congress to pass the [Charitable Act](#) and make the Universal Charitable Deduction (UCD) a reality.

We will call on PSOs and their foundation members to join the Forum in mobilizing the sector to support the Charitable Act. Be on the lookout for more communications on that in the coming weeks.

Grassroots and Community Engagement

PSOs and foundations can use grassroots engagement methods to work with communities and organizations around a shared issue they care about. Whether you are engaging with lawmakers, nonprofits, or community stakeholders, grassroots engagement practices can reinforce your work and broaden your reach.

Community Engagement Strategies

As a PSO or foundation leader, your role, experience, and expertise help you serve as an advocate and ambassador for the sector. You are uniquely positioned to lead discussions about the work of the philanthropic sector and the needs of the community you serve. The following tips and insights will help cultivate and strengthen your engagement with external stakeholders.

- **Know the Value and Impact of Philanthropy:** Have an elevator pitch about the good things accomplished by foundations and nonprofits in your community. Practice this brief speech so that you can easily inform stakeholders and respond to criticism with information about the value added by philanthropy.
- **Build and Join Coalitions:** Work in partnership and collaboration with other funders, nonprofits, and stakeholders who care about the issues you focus on, like the Forum's [Philanthropy Advocacy Circles](#). Whether you're trying to educate broader audiences or inform policymakers, working in coalition with others can help to broaden your reach.
- **Engage the Media:** Plan a site visit or tour of a funder-supported nonprofit or project and invite the local news to attend. Write an op-ed about the work of foundations in your area and highlight the connection to your policy issues.

Legislative Engagement Strategies

Philanthropic leaders and advocates such as yourself are in an excellent position to inform Members of Congress and their staff about issues impacting their constituents and the sector. Lawmakers often value the perspectives of PSO and foundation leaders regarding communities in their state or district. Use the following practices to engage with your elected officials during the Congressional recess period and beyond.

- **Meet with Members of Congress In Their District Office:** Send in-district meeting requests to elected officials to meet with you and a small group of local foundations, nonprofits, and/or community stakeholders. Meeting with lawmakers or their staff provides an opportunity to build a relationship with them, educate them, and ask them to take action on your legislative priorities.

- **Invite a Legislator to a Tour or Site Visit:** Members of Congress often enjoy being invited to tour or visit nonprofits or community projects in their state or district. It is a great way to bring attention to the work of the sector and to develop a relationship with a lawmaker. Be sure to take pictures to share on social media. If your Member of Congress agrees, inviting the local news can help further spread your message.
- **Participate in a Town Hall Meeting:** During the Congressional recess, many lawmakers host town hall meetings for local constituents. Attending a town hall meeting provides you with opportunities to speak with a legislator and their staff and connect with community stakeholders who might share your concerns. It also provides you with a chance to ask for a follow-up meeting with your Member of Congress or their staff.
- **Write to Your Legislator:** If you're unable to connect with a lawmaker through a meeting, visit, or town hall, drop off or send them a letter and packet of information about your organization and the policy issues you focus on.

Social Media Engagement Strategies

Online advocacy and social media engagement are important tools for bringing awareness to a policy priority. Social media can give you an edge in amplifying your advocacy efforts on behalf of the sector and communities we serve, including garnering the attention of congressional staff. Here are some helpful tips to guide your social media practices during the Congressional recess period.

Important Details

- Use #PhilanthropyAdvocates for any of your social media posts on Facebook, LinkedIn, Twitter, and other platforms.
- Follow United Philanthropy Forum on LinkedIn and Twitter @unitedphilforum.

General Tips for Live Reporting about Advocacy

- Post the most interesting quotes and stats presented during your engagement with lawmakers and staff. The goal is not to repeat verbatim all that is being said but rather to share the most impressive highlights.
- Attribute when possible! For example, use a format like “[name/Twitter handle] says [statement]. #PhilanthropyAdvocates”.
- Create your own campaign hashtag and/or use #PhilanthropyAdvocates in every tweet, update, and post.
- Retweet and share posts from sector advocates and/or your legislators.
- Identify the social media handles of the Members of Congress you will be meeting with and use that in your posts about your meeting. Don't forget to share a picture!

- Have fun and think of it as a way to capture your experience engaging with the community and/or legislators.

Top 5 Ways to Get You Started

- Post a photo with your Member of Congress and/or a community group.
- Post a thank you to your Member of Congress and/or a community group.
- Post a quote or something that you hear that's interesting.
- Post about the issues that you care about but keep it short and sweet.
- Post a photo of your community group outside of the Congressional District Office, town hall meeting, or other event location.

Sample Social Copy: Promoting the Philanthropy Day of Action

- (PSO Name/Handle) met with (Congressional Office) in support of the Charitable Act, a bill that would strengthen giving and provide a charitable deduction to the 90% of taxpayers who don't itemize their returns. #PhilanthropyAdvocates
- Represented (PSO Name/Handle) in Community Town Hall on behalf of foundations, nonprofits, and community partners to call on Congress to pass the Charitable Act. Spread the word across the philanthropic sector!
- Support charitable giving during Congressional recess by meeting with your Members of Congress in-district. Call on Congress to pass the Charitable Act! #PhilanthropyAdvocates

The grassroots engagement methods and tips described above can help you to successfully share your message with local stakeholders, build out coalitions of support, and advocate with legislators and their staff. Below you'll see more detailed tips, scripts, checklists, and resources to support your preparation for engaging Members of Congress and their staff during this August recess.

Tips, Scripts, and Resources for Advocating with Legislators

The Congressional recess is an opportune time to connect with lawmakers and their staff to advocate for your priority issues. The information, scripts, templates, checklists, and resources detailed in this section will help PSOs and foundations to think through and prepare for successful advocacy with Members of Congress and their staff.

Tips for Meeting with Legislators

- **Tell Stories, Not Bill Numbers:** Share testimonials or bring your foundation members who can share stories about philanthropy's impact on community issues in the elected official's district/state. Provide supporting data and information in a leave-behind packet.
- **Provide Local Data:** Many PSOs compile data on the most active funders in the state, total giving by congressional district, number of foundations by district, and a breakdown of issue areas supported by philanthropy.
- **Add a Personal Touch:** To stand out, make the interaction personal by doing research ahead of time about their background. Bring your foundation members or PSO board members who have existing relationships with the Members of Congress, live or work in their district, and/or have similar backgrounds.
- **Make a Clear Ask:** Ask for specific action from the member of Congress, such as to co-sponsor a bill, reach out to a colleague on an issue, bring up an issue at a hearing, host an event on an issue, or join a caucus. Respectfully seek a firm commitment to whatever action you are seeking.
- **Position Your PSO and the Forum as a Resource.** Let legislators know that you can be a resource for questions they get from constituents about philanthropy in their district/state and that you are a member of the Forum, which has offices in Washington, D.C.
- **Do Not Be Partisan.** Please do not make comments that are politically leaning or charged. The Forum works with elected officials in a nonpartisan manner.
- **Assign Roles:** Be clear with your group about who is playing which role during the meeting. You might consider the following roles:
 - **Facilitator:** Starts the meeting, thanks them for their time, introduces the group, and explains who you are and what you do.
 - **Storyteller:** Shares a story or anecdote about your work, ideally targeted to the priorities of whom you are speaking with.
 - **Number Cruncher:** Shares data or information relevant to the conversation and provides easy-to-understand handouts with the information.

- **Asker:** Makes the specific ask to the member of Congress about the action you want them to take.

Meeting Timeline Checklist

When scheduling the meeting:

- Look up your legislator's contact information at www.house.gov and www.senate.gov or request that [Nate Borek](#) provide the member's scheduler contact information for you.
- Call the district office and let them know you'd like to schedule a meeting during the August recess while your representative/senator is in the district.
 - Here is a sample script: "Hi, my name is (name), and I'm a constituent as well as an advocate for philanthropy with (name of your organization). I'd like to schedule a meeting with (Representative/Senator X) while they are home this August to discuss some of our policy issues and concerns. Could someone help me do that?"
 - If you leave a message or send an email and don't hear back within a week, call back, let them know whom you emailed or called previously, and go over your script again.
- Use this [template letter](#) to write your meeting request to the legislator's office, following the instructions provided to you over the phone or on the legislator's website. Then, follow up by phone to make sure your request was received.
- Reach out to members of your PSO who are located in or fund initiatives in a representative's district and invite them to join the meeting. The best way for you to get a lawmaker's attention is to offer them the opportunity to hear directly from a constituent who is working in or funding projects in their district.

A week before the meeting:

- If you plan on attending the meeting with funders in the area, talk together ahead of the meeting to develop your game plan.
- Review suggested talking points for our issues.
- Research your Members of Congress.
 - In addition to reading the information on their congressional website, ask your members if they and their leaders, staff, or board members have a relationship with the lawmaker.
 - Determine what committee(s) the Members of Congress sit on and what issue areas they care about. If they are a member of the [House Committee on Ways and Means or the](#)

[Senate Finance Committee](#), they have direct jurisdiction over many of the issues that affect the philanthropic sector.

- Find out if they are already co-sponsors of current bills that are of interest to our field so that you can thank them during your meeting or encourage them to co-sponsor.

A few days before the meeting:

- Email to confirm the date, time, and location of the meeting and provide a cell phone number for your group should the congressional staff need to contact you.
- Share any leave-behind documents electronically ahead of the meeting.
- Practice how you will share your story.
- Print out any information sheets that you will leave with the office, which could include a summary of philanthropy in a state or district, information about your PSO, and summaries of key bills. [See PSO leave behind examples on the Forum's site.](#)
- Print out talking points to use as a reference.

During the meeting:

- Arrive 10 minutes early.
- Thank the staff member and/or Member of Congress for their time.
- Introduce yourself and your colleagues.
- Tell your story.
- Share relevant data.
- Make a clear ask.
- Consider offering the opportunity for the legislator to do a site visit, perhaps to visit a local beneficiary of a local foundation's support.
- Ask to take a photo with the Member of Congress and your group before you leave.

After the meeting:

- In a social media post, thank the Member of Congress for their time and for any commitment they made during the meeting. Include any photos you took, the legislator's social media handle, @unitedphilforum, and #philanthropyadvocates and/or other hashtags related to the bill or topic that you are posting about.
- Follow up via email to thank the Members of Congress and their staff for their time, briefly recap the main points of the meeting, provide any extra information or data they requested, and restate your ask.
- If you talked about doing a site visit, follow up to confirm the details.

Town Hall Meeting Timeline Checklist

Many Members of Congress hold Town Hall meetings in August as a chance to hear from many of their constituents at one time. To find out if there is a meeting scheduled in your area, call your representative's or senator's office and ask if they will be hosting any Town Hall meetings.

Before the town hall meeting:

- Find out which Members of Congress are hosting town hall meetings. Visit www.house.gov and www.senate.gov to find your legislators' websites. Once on their website, you can search for their town halls and sign up to be on their mailing list, and get information on all upcoming events.

During the town hall meeting:

- Depending on the format of the meeting, you can either ask a question during the meeting or speak to your elected official/a staff member prior to or after the meeting.
- Raise your hand and ask a question! Most town hall meetings allow constituents to raise their hands to ask questions.
- If you get called on, start off by thanking the legislator for the chance to speak and sharing your name, your city/town, and your connection to philanthropy.
- You want to leave a good impression on the legislator and their staff so that future interactions are positive. It's also a chance to find support from other audience members, so be receptive to others who approach you after the meeting.

After the town hall meeting:

- Find a staff person to give your handouts and business card and to get their business card. Building positive relationships with the legislator's staff members is important because they often help schedule meetings and inform policy decisions.
- Ask the staff person if they would be the best person for you to follow up with. If not, ask if they can put you in touch with the most appropriate staff member.
- Follow up after a Town Hall meeting with a phone call or email to the legislator's office, preferably to the staff member you met.
 - This is another chance to share your story and ask for support of the policy issues you are advocating for. It also will help solidify the relationship and allow you to continue the dialogue in the coming months and years.

Note about Town Hall meetings: If a town hall meeting becomes contentious, do not be partisan and do not make comments that are politically leaning or charged. The Forum works with elected officials in a nonpartisan manner.

Drop by a District Office

If you can't schedule a meeting or attend a town hall meeting, you can stop by their district office during regular business hours to drop off information. Here's a suggestion on what you could say:

"Hi, my name is _____, and I live in _____. I am a constituent of _____ and an advocate for philanthropy. I wanted to leave some information here to pass on to the Representative/Senator while they are home for the Congressional recess. I have also included information on the impact of philanthropy in our district/state. Could you please pass this on to (Representative/Senator)? Thank you for your time and attention."



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