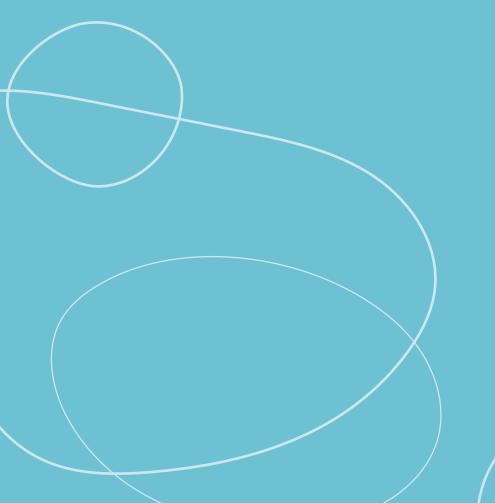
Provincial Election 2023:

Policy Advocacy Guide for Nonprofits





Welcome

The Provincial Election 2023: Policy Advocacy Guide for Nonprofits is a practical guide for nonprofits wishing to engage in advocacy during the 2023 provincial election. This Guide is intended to help inform a range of nonprofit stakeholders, including executive directors, staff, board members and volunteers, about the context, rules, and strategies that can be used to support nonprofit contributions to public policy dialogue and development.

The Guide is organized into ten chapters. The chapters can be read sequentially for a complete picture, or individually based on the needs and interests of your organization. Many of the chapters also contain practical resources that are downloadable and printable. The entire Guide, or individual chapters, can be downloaded in PDF format.

First created in early 2019 by CCVO, this Guide has been updated for the 2023 provincial electiont. Readers are encouraged to confirm that the information presented in this Guide is still accurate post-election.

No matter how you use this Guide, our intent is that it contributes to a healthy and participatory democratic process through the invaluable contributions of the nonprofits across Alberta.

Are there other topics or resources you'd like to see to support your advocacy efforts? Let us know at policy@calgarycvo.org.



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Chapter 1:

ADVOCACY IS A JOURNEY NOT A DESTINATION

No matter where you are in your advocacy journey, it is important to remember that engaging in advocacy is a long-term commitment that requires persistence and dedication while working towards your desired outcome. This chapter contains valuable insight that will help put the Policy Advocacy Guide into context to keep you motivated beyond election cycles and throughout your advocacy journey.

Preparing for the Long Game

When nonprofit organizations set out advocating for policy change, they might believe it is possible to achieve in a short period of time. Unfortunately, this is not usually the case, and it can take years for policy change to be realized. It is important to recognize that policy advocacy is an ongoing process, marked with both milestones and setbacks on the path to reaching your ultimate goal. However, each step taken, even one that may seem to counter your efforts, is a step towards your nonprofit's end goal. Given that the rewards of your work are not always immediately realized, it's important to be committed to your goal and ensure that everyone involved in your advocacy efforts has the same expectations from the outset. This will take planning, organizing, patience, and persistence. Remember, change does not happen overnight.

There is No One Way to Reach the Goal

Policy advocacy is critical, especially when reinforced during an election period. The election is a time when real change can occur for nonprofits, and also an opportunity for advancing your nonprofit's policy agenda (see chapter 6) with a strategic engagement strategy (see chapter 7). Bringing up a completely new issue during an election period may not be the best way to capture the attention of political candidates and parties, but you can seek commitment on issues that you have been consistently advocating for, at a time when candidates are listening to the wants of their constituents. This can be done by demonstrating strength in numbers, influence and impact, or through communicating the risks involved in losing support for the important work nonprofits do.

Policies and regulations can be created and undone during an election cycle – they can be eliminated by a determined opposition party, refocused political attention, or a change of government. The attention of legislators and policymakers can be quite short, often spanning only the time between elections. A change of government may bring to power politicians who know little or nothing about your issue, or do not see its value. Public attention also ebbs and flows – your nonprofit's issue might be the focal point of public attention today, but tomorrow you may find the public has moved on to other issues, leading to a loss of public support and setbacks to your advocacy efforts. Do not let these realities discourage you. These ebbs and flows are a natural part of democracy and reinforce why nonprofits must continue policy advocacy beyond election periods.

To reach your nonprofit's advocacy goals, remain adaptive and open to trying different approaches. Consider what you are comfortable compromising, and which issues you will advocate for at all costs. Advocacy is often about dialogue and negotiation, and it can be helpful to identify a "fall back" position that will allow you to still achieve an acceptable outcome, even if it is not perfect.

Tracking Your Success

Monitoring and evaluating throughout your advocacy efforts is crucial to success. During the planning and execution of an advocacy strategy, be sure to track progress towards your desired objectives. By monitoring what is working well and what is not, you will be able to stay on track to achieving your end goal. Be prepared to change your advocacy strategy if your monitoring shows that you are off course.

Evaluation, the measurement of the impacts of an advocacy project, examines the entire advocacy cycle. An effective evaluation focuses on the overall achievements of the project, and also measures the intended or unintended outcomes. Evaluation is about proving and improving – proving the success of your advocacy efforts and improving in areas that did not yield your desired outcomes.

Successful advocacy often depends on the current political environment, and the strategy that you are using, neither of which are easily measured. It requires a redefinition of what it means to succeed, and what it means to fail. Advocacy success does not necessarily mean that your ultimate goal is realized – you can, and should, also celebrate the small wins on the journey. For example, meeting with a Cabinet Minister to discuss your issue is a measurable objective to be recognized along the journey towards a goal of changing a policy.

Policy advocacy should not be treated as an end destination. Your efforts should continue beyond election periods, with a continued focus on achieving your goal. Do not feel the weight of your advocacy strategy is on your shoulders alone – your advocacy work will continue even beyond your own efforts, building on the collective success of other nonprofits and policymakers.

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What is Advocacy?

Advocacy is an activity performed by an individual or group that aims to influence decisions within political, economic, and social systems and institutions. Nonprofits often turn to advocacy work when seeking to achieve systems-level change that could not be accomplished through service delivery alone. Advocacy efforts by nonprofits can propel social change to better meet the needs of individuals and local communities.

Chapter 2:

WHY ADVOCACY MATTERS: THE CRUCIAL ROLE THAT NONPROFITS PLAY

We live in a world of budget and resource limitations, differing opinions and conflicting priorities. Engaging in advocacy is an opportunity for nonprofits to share their priorities with the public, represent communities, advance policies, and promote funding of meaningful objectives.

Nonprofits engaging in advocacy work bring benefits to communities at large, and also bring benefits to the organization through opportunities of attracting greater attention and creating broader impact.

Nonprofit Advocacy: The Public Benefit

Bridging the Public-Government Divide

Nonprofits that are connected to causes can provide a bridge between the abstractions of public policy and the lived experiences of those for whom policies are designed. Although governments may have tools to determine levels of client satisfaction, organizations that deliver programs can provide more thoughtful feedback on the way policies and programs are experienced on the ground. For example, when John Stapleton, Innovation Fellow with the Metcalfe Foundation, was asked about the interaction between advocacy organizations and government, he stated that contrary to popular belief, government tends to follow the lead of organizations that are rooted in community. Since public consultations are a key feature to effective policy making, without the advocacy work and input of nonprofits, policymakers would miss out on the public input needed for evidenced-based decision making.

Providing a Different Lens

According to author and political scientist Roger Gibbins, policy advocacy on behalf of registered charities is a moral imperative that should be encouraged rather than constrained. In Gibbins' address at CCVO's 2018 Annual General Meeting, he reminded us that nonprofits "not only bring more voices to the policy table, but also different voices". Indeed, nonprofits provide a platform for those with diverse interests who might otherwise be silent, such as prisoners and parolees, or endangered species and animals suffering from inhumane treatment. Without the concerted effort of individuals and nonprofits dedicated to various causes, certain voices, especially the most vulnerable and underrepresented, may otherwise remain silent in the policy process. While recognizing the polarizing climate we live in, and the context of a looming provincial election, Gibbins emphasizes that there continues to be an increase in the "necessity for, and risks of, advocacy" work.4

Nonprofit Advocacy: The Organizational Benefit

Achieving Greater Impact and Support

High-impact nonprofits may start out by providing important programs but may eventually realize that they cannot achieve large-scale social change through service delivery alone. Advocacy efforts have the potential to move the needle on longstanding challenges that have hindered a nonprofit's ability to move forward on its mission. Volunteers and donors may also be drawn to suppport a nonprofit working on systemic issues because of the possibility for broader impact and the potential to attract the attention of policymakers, community leaders, and influential figures. Advocacy work can strengthen the appeal of a nonprofit as it works toward a more diverse and effective approach to achieving societal impact.

Building Alliances

Real social change is seldom accomplished by organizations working alone. Advocacy work creates opportunities for organizations with similar objectives to come together and build alliances. Actively participating in formal and informal networks that advance an advocacy strategy is often the most effective way to reach a broader audience. When nonprofits come together to "think like a sector", they can avoid working in silos and capitalize on the benefits of a network approach to achieve greater impact.

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Get inspired with Bolder Advocacy's stories of nonprofit advocacy.⁵

Find out how nonprofits have used grassroots mobilization, public awareness campaigns and meetings with elected officials to bring about change in areas like access to healthcare and education. Let's learn and build on the success!

Chapter 3:

WHY NONPROFITS MATTER: THREE MAJOR CONTRIBUTIONS OF THE NONPROFIT SECTOR

In advance of the upcoming provincial election, it's important for nonprofits to recognize the potential influence they have, and meaningfully engage in public policy dialogue to capture the attention of political parties and candidates. Nonprofits have a profound impact in Alberta and it's important that organizations talk about the value of the sector as a whole – but it can be challenging to communicate the greater value of the sector to government. To help articulate this, we've highlighted three major contributions of the nonprofit sector that demonstrate its collective impact on society and the economy.

Nonprofits Contribute to Our Social and Cultural Fabric

Nonprofits play a vital role in society, providing key services for Albertans. Their work touches on social and cultural issues and values that are otherwise underserved. Nonprofits have been historically formed to fill a gap in services not provided by government or private businesses. For example, in the 1990s, the Government of Alberta outsourced the delivery of essential services to nonprofits to reduce the cost of government services. This government outsourcing led to the formation of many nonprofits within Alberta to provide essential services and support for citizens.

Nonprofits are incredibly diverse and enrich Alberta's social and cultural experience through a variety of subsectors, including: arts and culture, sports and recreation, religion, social services, development and housing, environment, education and research, health, and advocacy among others. Unique in their direct work with community groups, nonprofits serve diverse populations, geographical locations, harness insights and deliver solutions to complex societal challenges. With thousands of organizations providing much-needed services, nonprofits are significant contributors to the communities they serve, and the social and cultural makeup of our province.

Nonprofits are Cornerstones of a Thriving Economy

Nonprofits play a critical role within our economy. Canada's nonprofit and charitable sector is the second largest in the world, employing over two million people. There are more than 170,000 nonprofit organizations in Canada that represent 10.5% of the labour force and contribute to 8.5% of Canada's GDP.⁶

In Alberta, the nonprofit sector is equally important to the economy and creation of jobs. Its impact has grown substantially in the last decade and will continue to contribute to the economic wellbeing of the province.

In Alberta, the sector is comprised of:

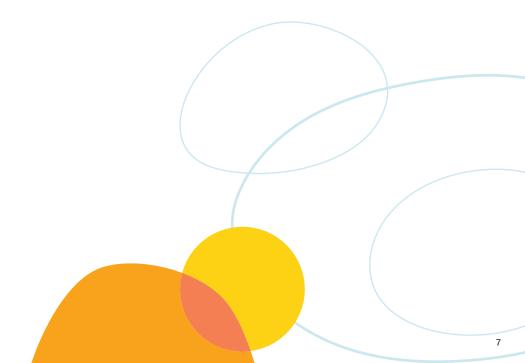
- More than 30,000 nonprofits in Alberta⁷
- \$5.5 billion in GDP⁸
- Nearly 300,000 nonprofit employees⁹
- 227 million annual volunteer hours¹⁰

Nonprofits are Crucial to Democratic Participation

Nonprofits play a vital role in democratic participation by bringing the voice of the communities they represent to public discourse. They work to increase awareness and understanding of issues by addressing policies, laws, and regulations relevant to their cause or the communities they serve, and are well positioned to hold governments and decision-makers accountable. Political candidates and parties seek out open dialogue with nonprofits in efforts to better understand and respond to their constituents' needs. This provides a platform for nonprofits to engage in advocacy relevant to their cause.

Despite the importance of democratic participation, nonprofits and charities have a longstanding hesitation towards policy advocacy, with some organizations even distancing themselves entirely to avoid risking their charitable status. Recent changes (see chapter 5) have been made in legislation to address these concerns and encourage nonprofit participation in public policy advocacy.

All nonprofits – including charities – have an important role in advocating for good public policy. This participation becomes even more important in advance of the provincial election.



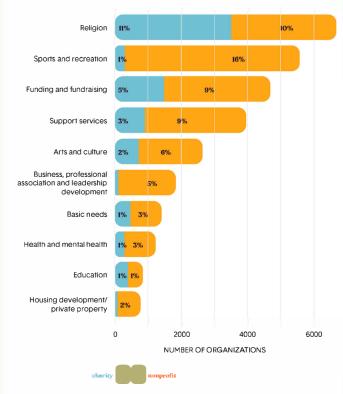
ALBERTA NONPROFITS AND CHARITIES

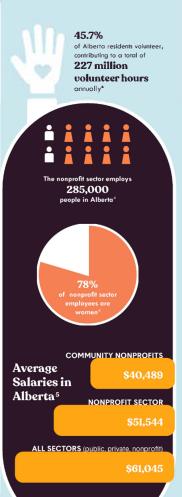
30.977 organizations across Alberta²

22,159 8.818 nonprofits charities



Top 10 service categories² in charities and nonprofits (# of organizations and % of total organizations)





52% of the

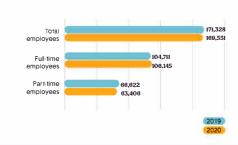
charities had a revenue of

<\$100K

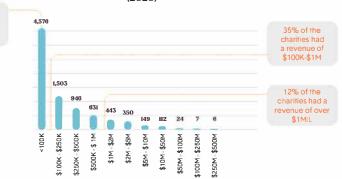
How community nonprofits in Alberta are funded8



Number of employees in charities (2019 & 2020)1



Number of charities based on total revenue (2020)1



Chapter 4:

NAVIGATING THE ALBERTA GOVERNMENT

You can empower your nonprofit to engage with the Alberta Government by knowing more about the types of decisions it makes, and the services and programs it provides. Being aware of the appropriate avenues to address policy concerns is one of the first steps towards effective advocacy and engagement for your nonprofit. This knowledge can elevate your advocacy efforts by ensuring the actors targeted are well positioned to listen, consult, and provide actionable solutions to your concerns.

The Alberta Government is empowered to create legislation in areas that fall within provincial jurisdiction, from health and education, to family and social services. It has three important branches: the Legislative Assembly, the Cabinet (or Executive Council) and the Public Service. Each branch serves a different role in policy and decision-making, approving relevant legislation, and providing programs and services to citizens.

The Legislative Assembly of Alberta

Alberta is divided into 87 constituencies (or ridings), representing over 4 million Albertans. Each of these constituencies has one seat which is represented by an elected official known as a Member of the Legislative Assembly (MLA). Together, each of these 87 representatives make up the Legislative Assembly of Alberta (also known as the Legislature or the "Leg").

MLAs are elected by Albertans through the 'first past the post style,' which means the candidate in each constituency who wins the highest number of votes becomes the MLA for that constituency. The Premier is the leader of the party forming the government. Provincial elections occur every four years between March 1 and May 31, with the date chosen by the Premier. MLAs in Alberta are generally affiliated with a political party. The dominant political parties in Alberta include the Alberta Liberal Party, the Alberta New Democratic Party (NDP), the Alberta Party, and the United Conservative Party (a merger between what was previously known as the Progressive Conservative Association of Alberta and the Wildrose Party). Independent MLAs do not belong to a political party.

Majority governments are formed when a political party wins more than half of the seats in the Legislature. Minority governments are formed when no political party wins a majority of seats. It is important to note that Alberta has never elected a minority government.

Members of the Opposition are MLAs who are not part of the governing party. The role of the opposition is to hold the government accountable, criticize government activity, propose amendments to policies, and present themselves to the public as an alternative to the party in office. They work to ensure that legislation is carefully considered, and alternate views are expressed and debated. The opposition party with the most seats is called the Official Opposition, and the leader of that party is known as the Leader of the Opposition. When bills or motions are introduced, the Leader of the Opposition, or an Official Opposition Critic, is usually called on after a Cabinet Minister who speaks on behalf of the Government.

MLAs also serve on Committees of the Legislative Assembly. These all-party committees discuss specific topics and then submit recommendations to the Legislative Assembly, such as a recommendation to implement a new Act or amend an Act already in place.

The Legislative Assembly votes on proposed legislation brought forward by any MLA. When a bill is brought forward by an MLA who is not a Cabinet Minister, it is called a Private Members' Bill. Bills become Acts once they have received three readings and Royal Assent, or proclamation by the Lieutenant Governor. The Assembly also votes on the provincial budget.

The Cabinet (Executive Council)

The Cabinet, also known as the Executive Council, is made up of the Premier and Cabinet Ministers. As head of the Executive Council, the Premier selects Cabinet Ministers from MLAs of the governing party to lead a Ministry. As such, citizens do not elect their Cabinet Ministers in direct elections. However, Cabinet Ministers are elected representatives of the Legislative Assembly and play an important role in our system of governance – even though in many jurisdictions, authority has become increasingly centralized in powerful offices of the Premier.

While MLAs are elected as members of a political party (except in the rare case of an Independent member), their role as Cabinet Minister is to act in the interests of the people they represent, not in the interests of their political party.

During sessions of the Legislative Assembly, Ministers introduce and debate legislation for consideration by MLAs. They are the main drivers of government policies and priorities. Cabinet Ministers present plans and budgets for areas of responsibility within their ministries to engage with MLAs and obtain funding authorization for programs. Ministers then develop department programs and ensure that laws administered by their Ministry are enforced. The Cabinet provides direction for policy development and implementation administered by the Alberta Public Service.

The Alberta Public Service

The Alberta Public Service is made up of over 27,000 government employees who perform policy, legal, and administrative duties needed to deliver programs and services to Albertans. These employees are non-partisan, meaning they do not represent a political party. These are not elected positions; rather, public servants are professional administrators and continue in their roles even when elected governments change. These positions are hired from within the Public Service, or through an external process open to the general public.



Relationship Between Nonprofits and the Alberta Government

The Alberta Government, like all levels of government, is intrinsically linked to nonprofits. It provides resources and support to nonprofits that help them to effectively accomplish their mission and initiatives, examples of this include:

- Providing programs and services that support communities.
- Providing grants, awards and other types of funding models.
- Leading key research and innovation initiatives.
- Partnering on educational and awareness campaigns.
- Providing a provincial platform to share ideas and perspectives.

In addition to election engagement opportunities (see chapter 7), your nonprofit should make efforts to build and establish relationships with public servants in the Alberta Government. Fostering these relationships allows for open communication and can streamline the sharing of information. Furthermore, public service employees are not elected officials, so even if the government of the day changes through an election, you may continue to benefit from the relationships that you have built with public servants. It is important to remember that your nonprofit is free to engage with all three branches in the Alberta Government, including local MLAs (members of the governing party and all other major political parties represented in the legislature), Cabinet Ministers and Alberta public servants.¹¹

Ready to engage, but still not sure what to connect with the government about?

Here is a list of ideas to get you started:

- Share the successes and impact of your nonprofit.
- Share your visions of the future for your nonprofit or the sector.
- Share different approaches for tackling common issues.
- Share how government programs and services are experienced in the community.
- Indicate needs for your nonprofit or the sector.

Three Levels of Government: Who Does What?

Understanding the different levels of government and strategically addressing concerns to the right level, will go a long way to ensure your nonprofit achieves its advocacy goals. To clarify these roles, the following chart lays out the high-level responsibilities of each level of government. Note that some responsibilities, such as environmental management, are the responsibility of more than one level of government.

THE FEDERAL GOVERNMENT addresses the needs of all Canadians, examples including:

- Aboriginal Laws and Rights (overlaps with provincial government)
- Canadian Pension Plan and Old Age Security
- Employment Insurance Benefits
- Income Tax Act
- Criminal Law
- Immigration Policies (overlaps with provincial government)

THE PROVINCIAL GOVERNMENT places its primary concern on the needs of Albertans, examples including:

- Education and Training
- Health Programs, Services and Regulations
- Family and Social Services
- Employment and Labour Standards

THE MUNICIPAL GOVERNMENT aims to handle issues facing citizens living within defined municipalities and local communities, examples including:

- Affordable Housing (overlaps with federal government)
- Community and Youth Services
- Public Transportation and Parking Bylaws
- Libraries, Parks and Public Spaces
- Waste and Water Management

Chapter 4: Navigating the Alberta Government

| RESPONSIBILITIES OF KEY MINISTRIES | | | | |
|--|--|--|--|--|
| MINISTRY | RELEVANT PROGRAMS AND SERVICES PROVIDED | | | |
| Ministry of Children's Services | Advancing Futures Benefit Alberta Child Benefit Child Care Support and Subsidy Child Intervention Early Learning and Child Care Centres | | | |
| Ministry of Seniors, Community and Social Services | Developmental Disabilities Support Employment Services Family and Community Support Family Violence Prevention Low-income Support Programs | | | |
| Ministry of Culture | Community Initiatives Program Sport, Recreation and Tourism Stars of Alberta Volunteer Awards | | | |
| Treasury Board and Finance | Budget planning Financial management and economic analysis Administration of tax and revenue programs | | | |
| Ministry of Education | Early Child Education Elementary Education Secondary Education Adult Learning Apprenticeship and Industry Training | | | |
| Ministry of Health | AHCIP Cancer Screening Continuing Care Mental Health and Addictions Midwifery Primary Health Care Protection for Persons in Care Seniors' Care | | | |
| Ministry of Justice and Solicitor General | Aboriginal Justice Child Support programs Court Services Criminal Law Dispute Resolution Network Family Law Victims of Crime | | | |

At present, the Alberta Public Service includes 25 ministries.

The ministries and Cabinet Ministers are subject to change, and very often do following an election. Each Ministry has a Deputy Minister, who leads the policy development that supports the work of the Legislative Assembly. Working with each Deputy Minister are Assistant Deputy Ministers who lead separate divisions of the ministry. Each division is divided into branches which are led by Directors. Managers report to Directors and staff report to managers.

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Chapter 5:

RULES OF ENGAGEMENT FOR NONPROFIT ADVOCACY

Before engaging in public policy advocacy, nonprofits should make sure they understand the rules and regulations around what they can and cannot do, so that they can engage with clarity and confidence. Knowing the rules can empower your organization to lead and provoke important discussions.

An election is a great opportunity to advocate for public benefit. As our friends at the Ontario Nonprofit Network say, "Don't be intimidated by rules and regulations about what charities and nonprofits can do during elections. Get informed!" The first steps to becoming informed, involve the understanding of three relevant regulatory areas:

- 1. Canada Revenue Agency's Regulations
- 2. Lobbying in Alberta
- 3. Third-Party Advertising in Alberta

These areas may or may not apply to your nonprofit, depending on whether you are a registered charity, you have paid staff, and how much you spend on election-related activities.

Canada Revenue Agency's Regulations

Nonprofit organizations that are federally registered as charities must adhere to the Income Tax Act (ITA) regulations, as interpreted and applied by the Canada Revenue Agency (CRA). Recent Amendments to the ITA allow registered charities to engage in unlimited public policy dialogue and development activities (PPDDAs), so long as these activities are:

- related to and support the organization's stated charitable purpose(s) and,
- nonpartisan (this includes a ban on both direct and indirect partisanship).

PPDDAs generally involve seeking to influence the laws, policies or decisions of a government, whether in Canada or a foreign country. In light of the new changes, charities must still be created and operated exclusively for charitable purposes. Only nonprofit organizations that are registered charities need to adhere to these regulations.

Direct and Indirect Partisanship

A charity can publicly agree or disagree with a decision or position of government, but cannot directly or indirectly support or oppose any political party or candidate for public office. Thus, a charity's communications should focus on policy issues and should not refer to any candidate or political party.¹³

Nonpartisanship does not mean non-participation. There are many ways that registered charities can engage in nonpartisan election-related activities. Furthermore, the ability to engage in nonpartisan advocacy can be viewed as a strength for organizations, as it can work to:

- Create an environment of respect for the diversity of political opinions among staff, volunteers and people who your charity serves.
- Give you access to diverse community leaders and funding sources.
- Reaffirm charities' position as trusted sources that can engage with and give voice to underserved populations and topics, beyond party lines.¹⁴

As Canadian citizens, staff and volunteers have a right to participate in the democratic process. ¹⁵ This means, as individuals, they are not bound to nonpartisan dialogue – as long as they are not acting in their official capacities as representatives of a registered charity. Check with your organization regarding any conflict of interest policies that may exist.

To avoid partisan engagement during your advocacy efforts, consider the following dos and don'ts.

Do:

- √ focus on the charitable purposes that your PPDDAs are meant to achieve.
- keep records that demonstrate your primary consideration in carrying on PPDDAs is to further your charitable purpose and provide a public benefit ¹⁶
- review legal requirements of other legislation such as Alberta Elections Act and Lobbying Act.
- give all political candidates and parties an equal opportunity to present their views and answer questions.

Don't:

- X focus on, promote or oppose a political candidate or party publicly or internally.
- instruct or influence constituents to vote for a specific candidate or party.
- X work with or coordinate with campaigns, political candidates or parties.
- * transfer resources (ex. financial, human, or physical resources) to support or oppose a political party or candidate directly or through a third party, or allow a political party or candidate to use your charity's resources without compensation.
- refer to or identify a political party or candidate when supporting or opposing a law, policy, or decision of government.

For more information on CRA's draft guidance documents and examples of direct and indirect partisanship visit here.¹⁷ Please click here for Explanatory Notes Relating to the Income Tax Act Legislation.¹⁸

Lobbying in Alberta

Lobbying is a legitimate activity in a free and democratic society. Lobbyist regulations across different levels of government are meant to balance free and open access to government with public transparency as to who is accessing and seeking to influence government.

The Alberta Government defines lobbying as communication with a public office holder in an attempt to influence matters relating to:

- Legislation (including legislative proposals, bills, resolutions, regulations and orders in council).
- Programs, policies, directives, or guidelines.
- The awarding of any grant or financial benefit.
- Decisions by the Executive Council to transfer assets from the Crown or to privatize goods and services.
- In the case of consultant lobbyists, arranging a meeting between a public office holder and any other individual; or communicating with a public office holder in an attempt to influence the awarding of a contract.¹⁹

Nonprofits are exempt from the Alberta Lobbyists Act and therefore are **not** required to register as lobbyists, except for:

- Nonprofits that are constituted to serve management, union or professional interests.
- Nonprofits that have a majority of members that are profit-seeking enterprises or representatives of profit-seeking enterprises.

By definition, lobbyists are **paid staff**. Nonprofits that fall under the exceptions above must only register if they have reached the **50-hour annual lobbyist threshold**, which includes both time spent lobbying and time spent preparing for lobbying.

Click here for more information on the different types of lobbyists and exemptions.²⁰

Third-Party Advertising in Alberta

Third-party advertising rules are meant to ensure that the public is aware of who is placing and paying for political and election advertising at the different levels of government.

In Alberta, "election advertising" refers to advertising that promotes or opposes a registered party or a registered candidate during an election advertising period (The election advertising period starts on December 1st, or from the issue of a writ for the election, until the end of polling day).

According to Elections Alberta, issue-based advertising that is not directly promoting or opposing a political candidate or party, can be included in third-party election advertising. This means if your nonprofit spends money on paid advertising that advocates for or against an issue that a registered party or candidate is merely associated with, you may need to register as a third-party advertiser.

A registered charity is not eligible to register as a third-party advertiser through Elections Alberta. However, nonprofits that are not registered charities are required to register as third-party advertisers if they have incurred or plan to incur expenses of at least \$1,000 for election advertising, or they have accepted, or plan to accept, at least \$1,000 in election advertising contributions. There are no advertising donation limits, but advertising expenses are limited to \$150,000 during the election advertising period.²¹

Please click here to view the full Elections Alberta Third-Party Advertiser Guide.²² In addition find some general information about Third-Party advertising here²³.

| PROVINCIAL RULES OF ENGAGEMENT: POLICY ADVOCAC | | | | |
|--|--|---|---|--|
| REGULATORY AREA | REGULATION | APPLIES TO | DOES NOT APPLY TO | |
| CRA Regulations | Charities can engage in unlimited public policy dialogue and development activities, so long as these activities further their charitable purpose(s) and do not involve the direct or indirect support of, or opposition to, any political party or candidate for public office. | Registered charities. | All other nonprofits (not registered charities). | |
| Alberta Lobbyist Act | Must register if 50 hours of lobbying has been reached. | Nonprofits that serve management, union or professional interests, or that have a majority of members or representatives that are profit-seeking enterprises. | All other nonprofits (not among the two listed exceptions). | |
| Alberta Third- Party Act | Must register if have spent or plan to spend \$1,000 or more on political advertising. | All other nonprofits (not registered charities). | Registered charities. | |

CLICK TO DOWNLOAD RULES OF ENGAGEMENT AT A GLANCE

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Chapter 6:

SETTING A POLICY AGENDA

There are no step-by-step rules or established set of parameters that nonprofits can follow to ensure success when seeking public policy change. What we can do, though, is develop a policy agenda – a set of issues or problems aimed at gaining the attention of policymakers and decision-makers – sometimes known as the "policy ask". Setting a policy agenda involves many components, including: identifying the issue, forming a clear goal or goals, framing the issue, and creating conditions for success.

It might seem like a daunting task to set a policy agenda, but it does not have to be an intimidating or complex process. Simply, setting a policy agenda is a way for your nonprofit to potentially increase its impact by focusing on a few key policy priorities. For example, you can clean waste out of a river, and also ask government to legislate that polluting rivers is illegal – both work to achieve the goal of a clean river. Policy advocacy work is best as a year-round focus, not just a one-off activity, which is critical in preparing for expected and unanticipated opportunities to bring your policy agenda forward.

Specific vs Broad Policy Agendas

It may be tempting to think of a policy agenda as a specific policy ask but this is not always the case. That might be true in some cases, where the policy agenda consists of a very technical or specific policy ask (e.g., requesting a cost of living increase for income supports). Specific asks can be helpful, as the issues your nonprofit is trying to address are likely complex, so your policy agenda might represent a stepping stone to the broader changes you wish to see. It may also be the case that a policy ask is more aspirational, idealistic, or inspirational (e.g., to reduce poverty by 50% in five years). Both of these approaches are valuable and serve different purposes – specific policy requests can make a big impact and broad policy requests can serve to prepare and motivate allies and supporters.

Creating a policy agenda is not likely to be a neat and tidy process. A good policy agenda is not created in a vacuum and is sure to be accomplished only after several revisions, lengthy discussions, and healthy debate. The more people you can talk to who have differing views and positions, the more robust and thoughtful your policy agenda will be.

To set the issue or issues on which you will focus your policy agenda, consider your strengths as a nonprofit by asking questions like:

- What issues have you already researched? What expertise do you possess?
- What policy issues have you been involved with in the past? Are there opportunities to build on previous momentum?
- If your nonprofit is a registered charity, does this issue fall within your charitable objects?
- What is the capacity of your nonprofit? Who can lead and who can support the work?
- What connections with the intended audience (e.g. government, community, industry) already exist?
- What are other nonprofits doing and can you leverage each other's work?
- What kind of policy shift would make a big impact on the people, community, or issue in your nonprofit's mandate?

Set Your Goal

Oftentimes, we consider policy change to be the end goal, but you may not want to start there. Ask yourself what it is you want to achieve with your policy agenda. The following are a few examples of some goals your nonprofit might be trying to reach through a policy agenda:

- Establishing credibility and/or expertise on a particular issue.
- Building relationships with bureaucrats, elected officials, and/or media.
- Maximizing impact by forging partnerships with other organizations.
- Creating engagement among stakeholder groups.
- Educating and/or informing decision-makers about issues.
- Seeking public commitment on a policy issue from parties (either through the party platform or other public declaration of support).

Framing Your Agenda

Framing refers to the lens that you will apply when communicating about the issue(s) on your policy agenda. There are multiple ways to look at every issue or problem, so it is important to frame your policy agenda with communications that are crisp, clear, and in a language that speaks to your audience.

Framing a policy agenda comes back to your nonprofit's ultimate goal – once you have become clear in what you hope to achieve, you can ask yourself some of the following questions to help you frame your policy agenda:

- What problem does this solve and how can that be communicated in a way that conveys the importance of your ask?
- Who is your audience? Be specific who are you trying to reach with your message?
- What is most relevant or compelling about this issue to your audience?
- What does your audience already know about this issue?
- What is the language that will resonate with this audience?
- What evidence exists for your issue? How prominently does the
 evidence feature in your message? Evidence to support your policy
 agenda is important but it is rarely the central story, it is a supporting
 player.
- Who does your issue impact? What would be the effect if your policy agenda was implemented?
- Who are the critics and what are the risks?
- Who are the allies and how can you bring them along?
- Whose jurisdiction does the issue fall into?
- How critical is the issue? Is there a need for immediate action or can it be addressed over time?



Creating Conditions for Success

Although there is no magic formula for developing a policy agenda, there are ways to set conditions for success to strengthen and position your policy agenda:

- You know people. And you know people who know people! Reach out to your networks, and the networks of your networks, to talk to a variety of people about your policy ideas. This may even lead to a collaborative approach and a stronger voice advocating for the same issue.
- 2. Test out your ideas for unintended consequences. Think through as many of the possible outcomes as you can by consulting with people who would be impacted by your policy agenda.
- **3. Know the timing.** Find out when and how all political parties are developing their platforms.
- 4. Stay up to date on current events. You can sign up for newsletters from parties, pay attention to news of the day, and find e-news sources that are timely and informative.
- Stay focused. Remain true to your policy agenda but be nimble on how to move it forward by monitoring, learning, and adjusting your plan as you go along.

CLICK TO DOWNLOAD A SAMPLE POLICY AGENDA

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Have fun with it!

Remember that setting a policy agenda does not have to be a daunting task, but instead a way to maximize the impact your nonprofit has on the communities you serve.



Chapter 7:

DEVELOPING AN ELECTION ENGAGEMENT STRATEGY

If your nonprofit has spent time determining a policy agenda, it's time to develop an action plan for engagement. The development and implementation of an engagement strategy is often when the work becomes publicly visible. Choosing to make your policy priorities visible is a significant step for your nonprofit and should be approached in a coordinated and strategic manner. This chapter focuses on tackling the shorter-term objectives through various tactics, which all work toward achieving longer-term advocacy goals.

Focus on Your Goals and Choose Your Tactics

The more time you spend setting your policy agenda (see chapter 6) and goals, the easier it will be to determine which tactics to pursue as you develop your engagement strategy. Figuring out this strategy will require you to review and assess which tactics are available to you and would be most useful in moving your policy agenda forward. These might include face-to-face meetings with political candidates or organized campaigns around an issue – each has its benefits and considerations. See the table at the end of this chapter for a snapshot of tactics you may consider using as part of your engagement strategy.

Bring People Along With You

As part of your strategy development, be sure to investigate what other advocacy efforts are happening in the community. Consider how other efforts might support, hinder, or cause you to adopt a more collaborative approach to your strategy. You might find that your policy agenda intersects with the work of other groups, or that it could be strengthened through a network approach. For instance, if a nonprofit immigrant serving agency was interested in fighting against discriminatory policies or practices in the workplace, they might choose to connect and share resources with an organization that recently published a report on strategies to address discrimination.

You might also consider that another group has the ability to speak better to certain issues and you could benefit from drawing on their strengths. Formal and informal networks can play out in different ways, from organizing a policy development working group, to carrying out joint projects, such as events or submissions to government. Keep in mind that networks tend to be held together by transparency and commitment to common values, as opposed to rigid adherence to specific group interests and objectives.

Know the Landscape

It will be important to stay connected to news outlets, political party websites, and community interests to keep tabs on when important information becomes available, and when political candidates plan to engage with the public. Create a timeline and plot out the initiatives that you would like to undertake and the important community discussions you will plug into. Start your planning early and focus on the four weeks leading up to the election (voting takes place on the 28th day after the date of the writ). While it is important to be organized and to have a solid engagement strategy, it is even more important to spend effort monitoring, learning, and adjusting your plan as you go. In the context of an uncertain political environment – such as what Alberta is currently in – policy advocacy planning should be flexible and responsive.

Craft Your Communications

Whatever tactic or combination of tactics you decide to pursue, it will always be important to focus on the content. Is the message you are sharing in your communications inspiring and effective? Here are a few questions to ask and tips to help guide the way as you engage with political candidates and your intended audience:

Is your content objective, fact-based, well-reasoned, and non-partisan?

TIP: Share local data and statistics about your nonprofit, or the broad nonprofit sector – you may surprise people with your findings.²⁴

Have you engaged your audience (communities, candidates, decision-makers, etc.) in different ways?

TIP: Your message often needs to be heard multiple times through different avenues before it is remembered.

Have you used storytelling in your communications?

People are more likely to remember information told as a story, with characters, a beginning, middle, and end, a plot, conflict, and resolution.

Have you used visuals and descriptive language in your communications to help create a picture of the solution you're proposing?

Research shows that readers understand and are more likely to remember material when it is expressed in language that allows them to form visual images or that connects to the senses. For example, the simple use of the word "sweet" draws a stronger response than "kind" and the same for "bitter" compared to "mean." For example, the simple use of the word "sweet" draws a stronger response than "kind" and the same for "bitter" compared to "mean."



Are your calls to action clear and specific?

TIP. Be clear on how the proposed solution will help your target audience solve the problem, and how they can play a role in the solution, to make the call to action more effective. For example, instead of asking people to end climate change, encourage people to reduce gas emissions by carpooling, riding a bike or walking.

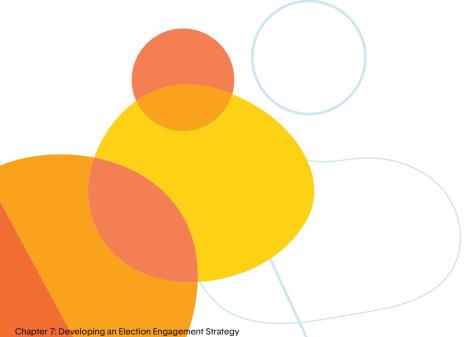
Are your recommendations to government or political candidates/parties clear and specific?

TIP: The more specifics you provide, the closer you will bring the decision-maker to deciding. For example, instead of asking for a nonprofit strategy, CCVO has specifically suggested the creation of a Premier's Advisory Council²⁷ on the Nonprofit Sector that reports directly to the Premier and Executive Council, an approach that will ensure clear lines of accountability.

CLICK TO DOWNLOAD A SAMPLE ENGAGEMENT STRATEGY

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| ENGAGEMENT STRATEGY TOOLBOX | | | | | |
|--|--|---|--|--|--|
| TACTIC | OPPORTUNITY | CONSIDERATIONS | | | |
| Hosting an all-candidates forum | Nonprofits are well-positioned to sponsor forums and increase public understanding of the election process and candidates who are running. | Candidates are usually more willing to attend when: they have clear positions on issues they expect a large audience there is guarantee of neutrality | | | |
| Attend candidate forums hosted by others | Many of these forums provide opportunities for questions from those in attendance - have your question prepared in case you have a chance to ask about your issue. | Be respectful of the organizer and make sure your issue is related to the topics at hand. | | | |
| Platform analysis | Reviewing party platforms, assessing what they have to say about issues of importance to your nonprofit, and sharing that information can be very valuable to people who care about the issues that your nonprofit works on. | Political parties may choose to share party platforms at different times and in different formats - check the CCVO website as we follow these developments. | | | |
| Sharing resources and background materials with candidates | This is a great way to educate candidates about your issues, your constituency, or your community. Candidates rely on you to educate them about your issues. | You may share research and your policy priorities with candidates, and ensure that the same information is available to all candidates. | | | |
| Attending meetings with individual candidates | These meetings can be helpful when a candidate's opinion is different from yours - to let the candidate know that there is an alternative and organized viewpoint. | Make sure to: Prepare talking points, issue, briefs, fact sheets, etc. Keep it brief and use plain language Anticipate their questions Send thank you letters, including contact information for further questions, and follow-up with summary notes, actions items, etc. | | | |
| Public awareness campaigns | Sharing stories and background materials through traditional and social media is a great way to increase understanding and awareness with public stakeholder groups and the community. | You may oppose or support a policy, but keep your communication nonpartisan by making sure it is not connected to a single candidate or political party. | | | |
| Get out the vote | Nonprofits have played, and continue to play, an essential role in the weeks leading up to elections. Traditionally marginalized groups (younger, diverse, low income) are often supported by nonprofits through access to information about how to vote and transportation to polling stations, among other supports. | When political candidates recognize the voting power of the nonprofit sector, they are more likely to listen to our issues and concerns. This is our opportunity to enage new voters and show power in numbers. Check the CCVO website for resources on voter engagement. | | | |

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apter 7: Developing an Election Engagement Strategy

Chapter 8:

TIPS FOR ENGAGING WITH THE MEDIA

Engaging with media outlets is one tactic to consider in your engagement strategy. Media exposure can help bring awareness to your causes and start public dialogue and collaboration among community members. This chapter highlights tips provided by CCVO's trusted contacts in media, that can help make your outreach to media more effective.

Understand the news cycle and newsrooms.

Mainstream media – major television networks and newspapers – have been significantly impacted by the advent of social media channels and continue to lay off staff as their revenues plummet. Because of this, most newsrooms have limited staff on the weekends. If you want to hold a press conference on a Saturday or Sunday, make sure to give the newsrooms several days' notice so they can plan accordingly. If you want to increase your chances of getting coverage, time the release for Monday to Thursday when more reporters are onshift and can more easily gain attention from public officials and other interested parties.

Before sending out your press release, understand the constraints all newsrooms face: tight deadlines, shrinking staff levels, and reporters who are increasingly inexperienced and lacking institutional knowledge – all with the expectation to file multiple stories a day. Knowing this, craft a press release with a clear "hook" and in plain language (imagine you're explaining the issue to an eight-year-old).

Don't shy away from conflict.

Editors love conflict, so play this up when possible. This does not mean you have to overly criticize the current government (nonprofits are in a difficult position because funding often comes from public sources and being diplomatic may be more prudent). Instead, frame the issue in a way that editors and reporters, and by extension the public, will understand how this issue would impact them. For example, a lack of affordable housing leads to more people living on the street, which means more money will be needed for police and other public services to keep people off the streets, which leads to tax increases - avoidable expenditures if affordable housing units were just built initially. To further validate your point in your press release, you might also highlight how fiscally conservative policies, such as cuts to affordable housing support, can be contradictory when considering the unintended cost increases that come as a result.

Put a face to your issue.

While your staff spokesperson will likely be replying to most media requests, your issue might also benefit from real people sharing their stories. To bring your story to life, confirm availability for someone impacted by the issue to speak to reporters the day you issue the press release. You will save reporters' time to track down a subject for the story and by having someone readily available who can comment. Saving this time increases the odds your story will make the news that day. If you are having people share their stories—ideally while you are present, you should determine in advance if they are comfortable to have their name and every detail of their story included, or if they want to remain anonymous and/or have certain details omitted.

Find a slow news day.

Your press release will be more likely get attention if there is less going on in the newsroom. If you are not promoting a specific event, or are tied to a certain day, consider what else is happening and avoid major local, provincial, and national events. For example, carefully reconsider sending out a release when the Prime Minister is in town, unless your issue is federally related.

Block off a day for media with your staff spokesperson.

If you are going to send out a press release, be prepared for a response. You might need to respond to a full day of interview requests across a variety of mediums, and have your nonprofit's spokesperson available for phone and in-person interviews for print, online, radio, and television. For small nonprofits, it is likely that your CEO will have hands-on knowledge and experience to handle all media interviews. However, if your nonprofit is larger, you should consider identifying the thought leadership of other team members to be spokespeople as well.

Make trusted media contacts and nurture those relationships.

Spend time getting to know media contacts and become a valuable resource for them. You do not always have to be on record, sometimes journalists need background information and news tips from reliable sources they can count on. In turn, they can be valuable resources for your nonprofit – just remember to respect their time.

Contact information for journalists is usually readily available – do a little research and find journalists who are writing about topics related to the issues you want to highlight, get in touch and even consider taking them for coffee to discuss mutual interests.

Don't be afraid to try media engagement!

One news story may go a long way towards maximizing your impact and advancing your advocacy efforts.

CLICK TO DOWNLOAD PRESS RELEASE TEMPLATE

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Chapter 8: Engaging With the Media

Chapter 9:

GET OUT THE VOTE AND JOIN #NONPROFITSVOTE

There is no more direct and powerful influence in an election cycle than casting a vote, and encouraging others to do so. Imagine the full force of the more than 30,000 nonprofits in Alberta joining together in an exciting and fun campaign to get out the vote. CCVO developed the nonpartisan #nonprofitsvote hashtag and materials to encourage nonprofit workers to get out the vote, talk about the issues that matter to the sector, get informed on party positions on important issues, and have fun doing it!

Why don't people vote?

32.5% of eligible voters in Alberta didn't vote in the last election. That's pretty astonishing when you think about the fact that nearly half of eligible voters quite possibly:

didn't think it was important to vote.

Apathy is often cited as a reason people don't vote, but at CCVO we believe that politicians are not always talking about issues that people care about in a way that is deeply connected to their lives. So, it's up to all of us to ask the right questions and get politicians talking publicly about the issues nonprofits care about, and that are important to our communities.

didn't think their vote would count.

People might think that their vote doesn't count. We know that this isn't the case – for example, in the 2015 provincial election, one riding in Calgary was decided by just six votes. Every vote counts.

 didn't hear politicians address any issues important to them during the election campaign.

There is an overwhelming amount of information that gets thrown at us during an election campaign, and sometimes it can be hard to know what is trustworthy and what is political spin. Nonprofits can help people find neutral and reliable information about the parties and candidates.

Why #nonprofitsvote?

With more than 30,000 nonprofits in Alberta, it's not a stretch to say that nonprofits touch the life of every single Albertan, whether it be as staff, volunteers, board members, or people who access nonprofits. We reach them through social supports, through the arts, through education, through sports, and so many other ways. We contribute to the economic engine of the province, the social and cultural fabric of our communities, and we strengthen civic and democratic engagement by amplifying the voices of those who might not otherwise be heard.

Nonprofits have a responsibility to speak up about the issues that matter to us and that drive us to make positive contributions to our communities. If we stay silent on these issues during an election campaign, we let other sectors drive the agenda and can mean

that we won't see meaningful commitments from political parties on issues that matter to the nonprofit sector. One of these parties will form provincial government, which will have direct decision-making power over issues that impact all of us. If we use our collective voice to encourage #nonprofitsvote, we can make a difference.

Why should #nonprofitsvote?

Encouraging people to vote is a nonpartisan activity. We know from past research that when nonprofits encourage people to vote, we can make a difference in the voter turnout, particularly among the people we serve. Nonprofits that engaged their clients about voting were successful in driving up turnout among groups that historically vote with less frequency.²⁸

There is nothing more empowering than marking your X on a ballot and encouraging others to do so as well. It can be a fun organizational challenge to vote together and to talk openly about the importance of voting.

How can #nonprofitsvote?

CCVO has the sector covered in the upcoming provincial election. We have more resources coming your way, in a Vote Kit specifically designed to provide tools to support #nonprofitsvote efforts.

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CCVO's Vote Kit will help you:

- Communicate about the importance of voting and the priorities of the nonprofit sector in a nonpartisan way with your networks.
- 2. Get easy access to information on how and where to vote. There are a lot of resources out there and we will make it easy to find so you can share.
- Find information on issues important to the sector. The Nonprofit Vote has released 5 Platform Priorities for the sector and will be analyzing party platforms for their inclusion of these priorities.
- **4.** Ask your party leaders to support the 5 Platform Priorities and let them know that #nonprofitsvote.

The nonprofit sector is powerful and important and together we can make sure that the provincial parties address issues that are crucial to all Albertans.

Together, we can make it known that #nonprofitsvote!

Chapter 10:

AFTER THE ELECTION, THE REAL WORK BEGINS

Following the election, while the shock waves of the campaign still echo, it's time to start focusing your policy priorities and planning your advocacy efforts for the future. That's when the real work begins.

Advocacy After the Election

During the 1993 federal election campaign, Prime Minister Kim Campbell was pointedly asked a question by a journalist about a detailed and complex policy matter. She responded by saying that this wasn't the time to get involved in a debate about serious issues. Afterwards, she was roundly criticized for speaking the truth.

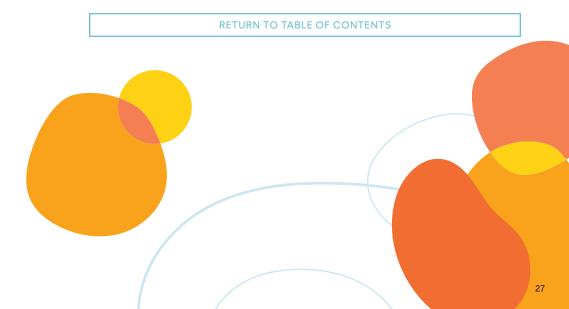
While it may have been unwise for a political leader to point this out, the reality is that election campaigns are typically dynamic contests shaped by emotions and nuance. And while political parties usually put considerable effort into building their election platforms, the outcome of a campaign is often decided more by the overall mood of the electorate and the personalities of candidates and party leaders.

This is not to say that policy advocacy doesn't matter; rather, it's important to recognize that advocacy efforts need to start well before the advent of an election campaign – and continue afterwards as well. After all, policy advocacy is a journey, not a destination. If a specific policy proposal finds its way into a political party's election platform, it's often the result of a lot of hard work in the months, and even years, prior to an election. And if a party wins the election, it is generally assumed that its governing mandate includes the policy proposals it campaigned on.

Five critically important ways for nonprofits to follow up after the election:

- Offer congratulations and thanks. Political parties and candidates required some encouragement and support following the election. The victorious party and all successful candidates should be congratulated. Other parties and unsuccessful candidates should also be thanked for their contributions to the democratic process. The importance of such courtesies is bolstered by the importance of relationships not only in the immediate aftermath of an election campaign but also for the future. The next election is only four years away!
- 2. Look for ways to help. The party that wins the right to govern will need some help. It might have a well thought out policy platform, but will need some assistance in implementing these ideas. This is where working constructively with elected representatives, political staff, and the public service become vitally important. Non-governmental stakeholders are increasingly valuable for elected governments seeking public acceptance for their various initiatives. In fact, it's difficult for any government to proceed with a bold policy agenda unless it can demonstrate broad public support.

- 3. Leverage your credibility. In an age of political polarization and growing distrust of institutions, nonprofit organizations are particularly well positioned to work in collaboration with policymakers. Nonprofits are among the most trusted groups in our society. And they collectively represent one of the largest and most important sectors of our province, contributing approximately \$5.5 billion to Alberta's GDP. With more than 30,000 nonprofits working to make every community in our province stronger, elected representatives are increasingly aware that this vital sector can't be taken for granted.
- 4. Engage, regardless of who wins. What if the election results are disappointing to you personally? Changes in government are always challenging, especially if you don't support the winning party or respect the leader. A natural reaction might be to brace for the worst. However, that emotional response could actually contribute to negative consequences. On the other hand, most new governments are seeking ideas and allies. This is a perfect opportunity for relationship-based advocacy. In fact, many nonprofit leaders have noted that the big policy changes they've been associated with have come from so-called unsympathetic governments.
- 5. Stand your ground. In the aftermath of an election, while some are celebrating the joys of victory and others are licking their wounds in the disappointment of defeat, stand your ground. Regardless of whether the party you supported has triumphed or been vanquished, don't give up. For you will have allies waiting for you in cabinet, in caucus, and in the public service. Your members, supporters and stakeholders will need you to be more clearheaded and caring than ever.



Chapter 10: After the Election

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