

Shedding Light on 501(c)(4) strategies: Evaluating the role and influence of 501(c)(4) organizations

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The Case for Evaluating 501(c)(4) Strategies

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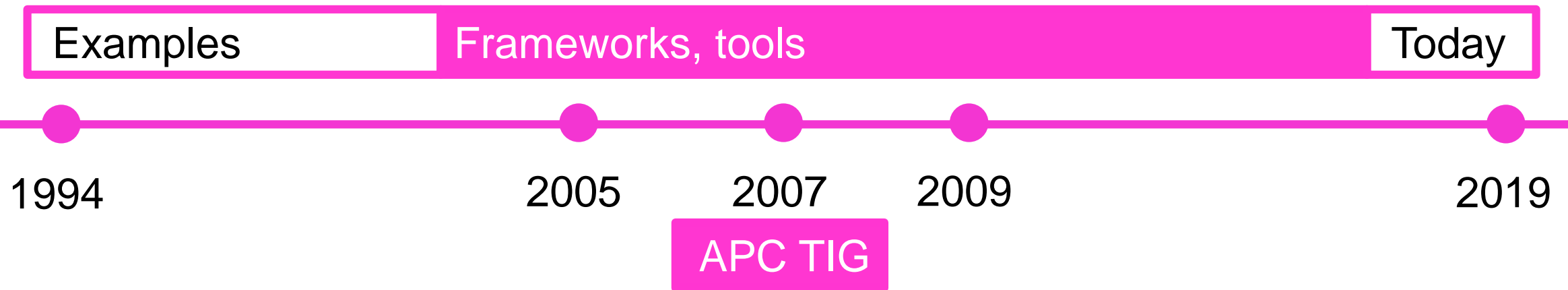
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CENTER FOR
EVALUATION
INNOVATION



Funders, evaluators, and advocates have been grappling with **evaluating advocacy work** for over 25 years.



501(c)(3) organizations are charitable, religious, educational, scientific, literary, public safety, sports, and/or preventive of cruelty to children or animals. They are restricted in how many political and legislative activities they may conduct.

501(c)(4) organizations are social welfare organizations that may pursue educational, lobbying, and some limited political activities (as a secondary activity).

501(c)(3) strategies
and tactics haven't
failed.

There are limits to
how far they can go.

“We typically fight with
501(c)(3) dollars, and
501(c)(3) activities are
insufficient to win.
Critical, necessary, but
not sufficient.”

—Deborah Barron
New Left Accelerator



Quote from Philip Rojc, *Fight on All Fronts: A Progressive Group Looks to Build Political Power*, Inside Philanthropy, May 2019

What can 501(c)(3) organizations do?

	501(c)(3) public charity	501(c)(4)
Lobby for/against legislation	Limited	Unlimited
Educate candidates on issues within purview of the organization	✓ (must offer information to all candidates)	✓
Sponsor a debate between candidates, where all viable candidates are invited and given equal opportunity to speak on a broad range of issues	✓	✓
Distribute voter guides to the public that set out the candidates' views on a broad range of issues	✓	✓
Establish a 501(c)(4)	✓	✓

Selected activities from Bolder Advocacy, *Comparison of 501(c)(3) and 501(c)(4) permissible activities*, 2018

What can 501(c)(4) organizations do?

	501(c)(3) public charity	501(c)(4)
Endorse candidates and publicize its endorsements	X	✓
Compare organization's issue position with that of a candidate	X	✓
Connect organization's criticism of public official to voting in an election	X	✓
Distribute voter guides to the public that compare candidates on issues of importance to the organization	X	✓
Fund independent expenditures in support of or opposition to a candidate	X	✓
Conduct voter registration and GOTV activities based on party affiliation or how people will vote	X	✓

Selected activities from Bolder Advocacy, *Comparison of 501(c)(3) and 501(c)(4) permissible activities*, 2018

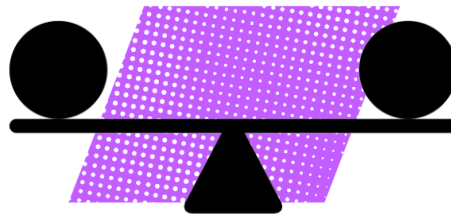
WHY EVALUATE 501(C)(4) EFFORTS?

We need to reckon with evaluating 501(c)(4) efforts. Otherwise, we will find ourselves unable to speak meaningfully to the progress and setbacks our clients experience.

My client is a 501(c)(3). What can I do?



Educate yourself about the limits of what a 501(c)(3) can do.

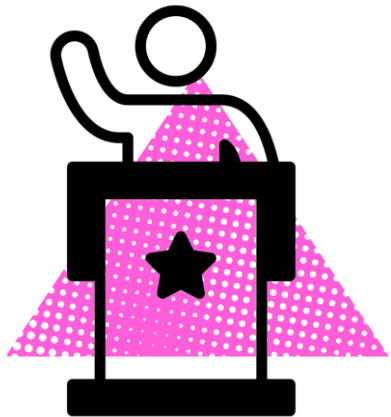


Use nonpartisan measures that can show whether a 501(c)(4) is able to advance its advocacy agenda.



Evaluate 501(c)(3) activities of a 501(c)(4) organization.

And...what should I look out for?



Do not assess contribution to election or defeat of a candidate for public office



Avoid evaluating 501(c)(4) partisan political activities

Where to start? Check out these resources.

Bolder Advocacy

866-NP-LOBBY

bolderadvocacy.org

Strengthening Emerging Social Justice Groups and the Intermediaries That Support Them

Change Elemental

changeelemental.org/resources/strengthening-emerging-social-justice-groups/

Why Some Politically Active 501(c)(4) Organizations Are More Effective Than Others

Margaret Post

scholars.org/contribution/why-some-politically-active-501c4-organizations-are-more-effective-others

Atlas Learning Project

atlaslearning.org

Philanthropy's New Playbook for Policy Advocacy

Urban Institute

urban.org/events/philanthropys-new-playbook-policy-advocacy

From the Streets to the Courts to City Hall: A Case Study of a Comprehensive Campaign to Reform Stop-and-Frisk in New York City

Gigi Barsoum

atlanticphilanthropies.org/wp-content/uploads/2017/10/CPR_CaseStudy.pdf