

# 501(c)(4) Resources in Advocacy Ecosystems

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

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November 15, 2019



# Advocacy Ecosystems

***What are they?***

A community of interacting individuals and organizations bounded by a purpose of influencing the policies and practices of institutions.

***What kinds of organizations are in them?***

Policy advocacy organizations and think tanks, community organizing groups, memberships and associations (e.g., business), faith organizations (e.g., churches), labor groups, and funders.

***What do we know about them?***

Funding and evaluation has mostly focused on the role of 501(c)(3) organizations within these ecosystems.

# Why pay attention to 501(c)(4) resources in advocacy ecosystems?



An **ecosystem** is usually needed to influence policy and practice change, including 501(c)(4) organizations.



Many **501(c)(4) advocacy organizations play special roles in their advocacy ecosystems**, working closely with decisionmakers behind closed doors, speaking on behalf of other advocates, and negotiating policy deals.



Because of that special role, it is important to understand the size and location of 501(c)(4) resources, including (1) how the 501(c)(4) organization(s) **interact with others** in the ecosystem; and (2) the resulting **relationship and power dynamics** and their effect.



*What if we don't  
pay attention to  
501(c)(4)  
organizations in  
advocacy  
ecosystems?*



# Five Questions

## About 501(c)(4) Resources in Advocacy Ecosystems

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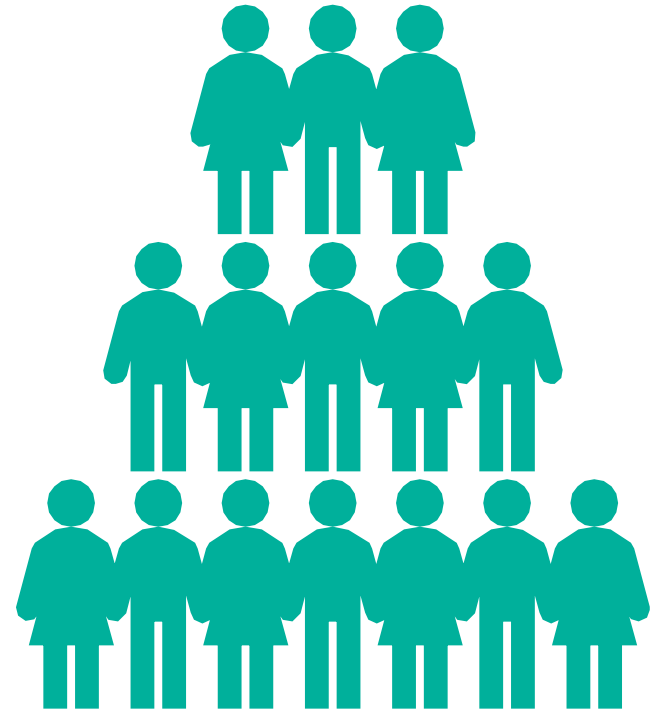
1. Who is the 501(c)(4) organization accountable to?
2. What is the size and location of the 501(c)(4) resources in the advocacy ecosystem?
3. What is the nature of relationships among 501(c)(3) and 501(c)(4) organizations?
4. How well aligned and coordinated are the strategies and tactics of 501(c)(4) and 501(c)(3) organizations?
5. Who can engage in learning conversations about advocacy ecosystems that encompass 501(c)(3) and 501(c)(4) organizations?

# 1. Who is the 501(c)(4) organization accountable to?

Does the 501(c)(4) organization have its own base of directly affected people? How does this affect their role in their advocacy ecosystem?

## *Assessment Options*

- Surveys, interviews, or desk research to identify which organizations have members and if those members are people who are directly impacted by the advocacy issue.
- Layer on organization profiles or network maps to get a feel for which organizations are more/less accountable to a base or where their accountability lies.



## 2. What is the size and location of the 501(c)(4) resources in the advocacy ecosystem?

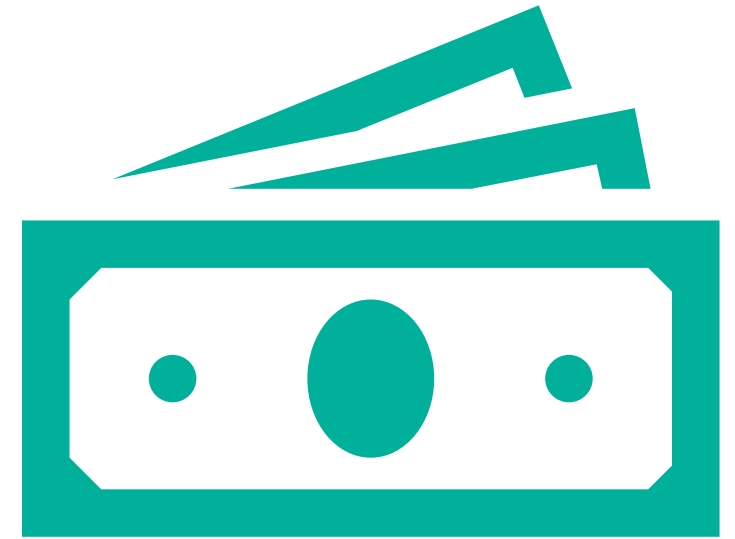
How do these resources compare to the 501(c)(3) resources in the advocacy ecosystem?

### *Assessment Options*

- Collect grantmaking/financial data from funders *and* grantees.
- Layer this information on organization profiles or a network map.

### *Challenges*

- Funders, grantees, or both may be unwilling to share complete funding information. Collect this information from as many sources as possible.

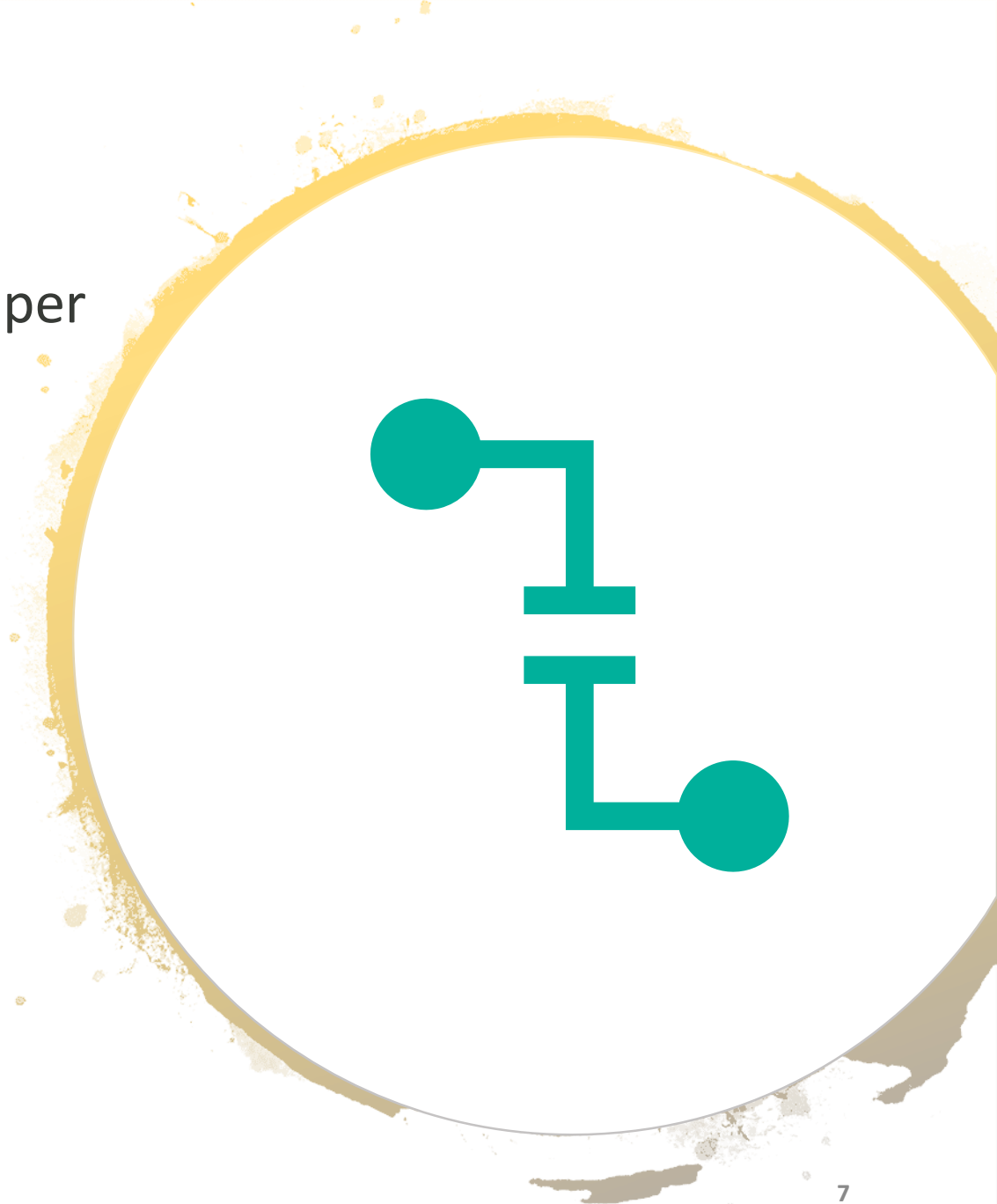


### 3. What is the nature of relationships among 501(c)(3) and 501(c)(4) organizations?

As the 501(c)(4) organization can be a gatekeeper with decisionmakers, do the 501(c)(3) organizations trust the 501(c)(4) organization to speak and act on their behalf?

#### *Assessment Options*

- Advocate interviews from across an advocacy ecosystem.
- Observation of campaign forums and communication.





## 4. How well aligned and coordinated are the strategies and tactics of 501(c)(4) and 501(c)(3) organizations?

Are the “inside” and “outside” games both sufficiently resourced?

### *Assessment Options*

- Advocate interviews about their individual and collective efforts and their perspectives on how well aligned/coordinated those are.
- Bellwether or other key informant interviews.

### *Challenges*

- Be aware of real or perceived legal impediments to coordination across 501(c)(3) and 501(c)(4) organizations.



## 5. Who can engage in learning conversations about advocacy ecosystems that encompass 501(c)(3) and 501(c)(4) organizations?

### *Challenges*

- 501(c)(3) organizations and funders may limit their engagement well shy of legal boundaries which limits the ability to learn as an integrated ecosystem.
- Seek the involvement of an expert regarding the legal parameters for learning and strategy conversations.
- Evaluators can do real harm by improperly describing the interactions of 501(c)(3) and 501(c)(4) organizations and possibly by inviting conversation about collaboration.





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5. Who can engage in learning conversations about advocacy ecosystems that encompass 501(c)(3) and 501(c)(4) organizations?



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