

UNITED PHILANTHROPY FORUM

PSO Engagement Toolkit: The Charitable Act



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United Philanthropy Forum Charitable Act Engagement Toolkit

Fall 2023



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



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The Charitable Act Engagement Toolkit

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**** For private foundations, advocacy and lobbying activities in support of the universal charitable deduction falls under the self-defense exception. Private foundations may participate in direct lobbying activities for this legislation and other legislation designed to protect the charitable deduction.***

Overview of the Philanthropy Day of Action

About the Philanthropy Day of Action

United Philanthropy Forum is calling on PSOs, foundation leaders, and sector advocates to participate in a *Philanthropy Day of Action* on October 4, 2023, in support of the [Charitable Act](#) (S. 566/H.R. 3435).

As a membership network representing more than 7,000 funders, Forum member-PSOs are uniquely positioned to lead sector mobilization efforts advocating in favor of the legislation, which would incentivize millions of more Americans to give and support their communities by restoring the non-itemizer charitable deduction.

Purpose of the Philanthropy Day of Action Toolkit:

As 2022 was one of the worst years in philanthropy historic with giving dropping 10.5% after inflation, the [Charitable Act](#) presents the best opportunity the sector has had in years to make the universal charitable deduction a reality.

The purpose of this toolkit is to guide PSOs as they work to mobilize their staff and foundation members on **October 4th** in support of the Charitable Act. A concerted and collective effort by PSOs and foundation leaders has the ability to bring a renewed awareness to the legislation and garner more support in Congress.

The Philanthropy Day of Action will:

- **Include Various Methods of Advocacy Communications.** ALL advocacy efforts can be done by anyone, anywhere around the country, with access to a phone and a computer. Sector leaders and advocates can participate in the #PhilanthropyDayOfAction via the following methods:
 - Calling Their Members of Congress
 - Using the [Forum Advocacy Action Center](#) to Send a Pre-Written Email to Their Members of Congress and/or
 - Posting a message to your legislators on social media
- **Include Resources for Engagement.** Use this toolkit's resources to promote the #PhilanthropyDayOfAction to the broader sector and as a guide for advocates to contact Members of Congress on **October 4th**, about the positive impact the Charitable Act would have on their constituents and their communities.



#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

- **Help Make the Universal Charitable Deduction A Reality.** The success of this campaign will require Forum member-PSOs to promote the #PhilanthropyDayOfAction to foundation leaders and staff. It will also depend on PSOs and their members mobilizing en masse, urging their Members of Congress to support the Charitable Act (S. 566/H.R. 3435) on **October 4th**.

The Forum also leads as a steering committee member of the national Charitable Giving Coalition, made up of nearly 200 national organizations. This Philanthropy Day of Action is being done in concert with the national coalition to further amplify the sector's voice on Capitol Hill.

Who Can Participate?

PSO staff, foundation leaders and staff, nonprofit staff, volunteers, and the broader charitable sector are encouraged to participate in the *Philanthropy Day of Action*.

Why This Matters?

- Charitable giving works and is good tax policy. For 2020, more than 25% of all non-itemizers claimed the special \$300 deduction, or 42.5 million more taxpayers participated. That temporary small non-itemizer generated \$10.9 billion in charitable giving that year.
- However, charitable giving dropped 10.5 percent after adjusting for inflation in 2022, only the fourth time donations have fallen since 1956. Additionally, charitable giving as a share of personal disposable income dropped to 1.7 percent – a near 30-year low.
- 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. A simple calculation shows that those in need receive at least \$2.50 in benefits for every \$1 of tax benefit.
- This is an impressive return on investment. Mobilizing for the Charitable Act will incentivize millions of more middle and lower-income Americans who don't itemize to give and support their communities.



Overview of the Engagement Toolkit

This engagement toolkit aims to support PSO mobilization of their foundation members and the broader sector in support of the [Charitable Act](#).

The toolkit also includes resources for Forum members and funders to use to advocate for the Charitable Act on October 4th.

Below you'll find tools, tips, and resources that PSOs can use to urge your member foundations to participate in the Philanthropy Day of Action.

Before the Philanthropy Day of Action

The first section of the toolkit includes resources that Forum member-PSOs can use to encourage their foundation members to join the #PhilanthropyDayOfAction.

Use the toolkit's sample promotion language as a guide for outreach to your foundation members via **website, email, and/or social media** to communicate the details of the #PhilanthropyDayOfAction.

On October 4th – Philanthropy Day of Action

The second section of the toolkit includes resources that PSOs and their foundation members can use to actively advocate for the Charitable Act on the #PhilanthropyDayOfAction.

PSO staff and their members may use the [Forum Advocate Action Center](#) and provided sample language for phone calls and social media provided here to ask your lawmakers to co-sponsor the bill or encourage their colleagues to co-sponsor the bill.

Share these resources with your members and help mobilize them in support of the Charitable Act on October 4th.



Promoting the Philanthropy Day of Action

PSOs can play lead role in mobilizing the broader sector by encouraging their member foundations to participate on October 4th. Promoting the #PhilanthropyDayOfAction will help PSOs members familiarize themselves with the “gameplan” for collective sector advocacy.

Forum member-PSOs may use the sample promotional language below to help guide their communications with foundation members about ways to participate in the #PhilanthropyDayOfAction.

In addition to the language below, PSOs may use the Forum’s [Philanthropy Day of Action Resource Kit](#), which features social media graphics, District to D.C. Advocacy Network logos, and more.

Sample Promotional Language for Websites and Email

Sample Promotional Webpage Language

Philanthropy Day of Action for the Charitable Act

October 4, 2023

[INSERT PSO NAME] urges our members to join United Philanthropy Forum’s **Philanthropy Day of Action on October 4, 2023**, in support of the [Charitable Act](#) (S. 566/H.R. 3435). This unique opportunity presents a chance for us to lend our voice to an issue that directly impacts our work as a sector and the communities we serve.

Charitable giving [dropped 10.5 percent](#) in 2022, only the fourth time donations have fallen since 1956. Additionally, charitable giving as a share of personal disposable income dropped to 1.7 percent – a near 30-year low.

Participate in the Philanthropy Day of Action:

On October 4th, advocate in support of the Charitable Act by calling, writing, or posting on social media to ask your Members of Congress to co-sponsor the bill.

The Forum’s [Advocate Action Center](#) can be used to send a pre-written email to your lawmakers in less than five minutes. If your legislators already co-sponsored the bill, thank them on social media and urge them to ask their colleagues to join them as a co-sponsor, using the hashtags **#PhilanthropyDayOfAction** and **#CharitableAct**.



#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

More ways to engage:

- Use the Forum's [Day of Action Resource Kit](#) to help you reach to lawmakers via social media on October 4th.
- Consider writing an op-ed for your local newspaper about why your legislator should support this bill.
- If you've already asked your lawmakers to support the Charitable Act, follow up to confirm their commitment.

Join **[INSERT PSO NAME]** and the broader philanthropic sector in collectively calling on Congress to make the universal charitable deduction a reality!

Sample Promotional Email/Newsletter Language

Advocate for Charitable Giving! Join the Philanthropy Day of Action on Oct. 4!

[INSERT PSO NAME] urges our members to participate in United Philanthropy Forum's **Philanthropy Day of Action on October 4, 2023** in support of the [Charitable Act](#) (S. 566/H.R. 3435). Join your philanthropic sector from across the country in calling on Congress to support the Charitable Act, a bill that would incentivize giving at a time when we've seen historic declines in charitable contributions.

With the Charitable Act introduced in the House and Senate, **[INSERT PSO NAME]**'s foundation members are uniquely situated to advocate for this shared sector priority.

Participate in the Philanthropy Day of Action on October 4th by calling, [writing](#), and/or posting on social media to ask your lawmakers to co-sponsor the Charitable Act (S. 566/H.R. 3435). If your legislator has already co-sponsored the bill, thank them on social media using the hashtags #PhilanthropyDayOfAction and #CharitableAct.



Who should join: PSO staff, foundation leaders and staff, sector advocates, volunteers, and nonprofits are encouraged to ask legislators to support the Charitable Act.

Add your voice to the chorus of support for the Charitable Act! Join **[INSERT PSO NAME]** and the broader philanthropic sector in collectively calling on Congress to make the universal charitable deduction a reality!

If you have any questions about the Charitable Act or the Philanthropy Day of Action, contact United Philanthropy Forum Senior Director of Public Policy, [Matthew L. Evans](#).

Sample Promotional Language for Social Media

Forum PSO members may also use social media to urge your foundation members to participate in the Day of Action. Be sure to include the graphics included in the [Philanthropy Day of Action Resource Kit](#) and the hashtags #CharitableAct and #PhilanthropyDayOfAction. Lastly, remember to follow the Forum on [LinkedIn](#) and @UnitedPhilForum on [Twitter](#).

Sample Promotional Tweets

- [INSERT PSO NAME] urges our members to join @UnitedPhilForum's #PhilanthropyDayOfAction on 10/4 in support of the #CharitableAct. Write, call, or post on social media to ask your lawmakers to co-sponsor this bill!
- Calling all foundation leaders and staff! [INSERT PSO NAME] is participating in @UnitedPhilForum's #PhilanthropyDayOfAction for the Charitable Act, which would strengthen charitable giving. Join us by asking your lawmakers to co-sponsor the bill on Oct 4!
- [INSERT PSO NAME]'s members have a unique opportunity to join @UnitedPhilForum's #PhilanthropyDayOfAction in support of the #CharitableAct. On Oct 4th write, call, and post on social media to ask your legislators to co-sponsor the bill!

Sample Promotional Posts for LinkedIn, Facebook, and other Platforms

- [INSERT PSO NAME] urges our foundation members to join United Philanthropy Forum's #PhilanthropyDayOfAction. On October 4, 2023 ask Congress to support the #CharitableAct. At a time when giving has declined, this bill would incentivize giving by creating a universal charitable deduction.

On October 4th, join the [INSERT PSO NAME] and the broader philanthropic sector by calling, writing, and posting on social media to ask your lawmakers to co-sponsor the Charitable Act!

- Calling all foundation members! [INSERT PSO NAME] encourages you to join United Philanthropy Forum's #PhilanthropyDayOfAction on October 4, 2023, in support of the #CharitableAct. This bill would incentivize millions of more Americans to give and support their communities by restoring the non-itemizer charitable deduction.

Join [INSERT PSO NAME] in urging Congress to support communities. Call, write, or post on social media on October 4th to ask your lawmakers to co-sponsor the Charitable Act!

- [INSERT PSO NAME]'s foundation members have a unique opportunity to support charitable giving by participating in United Philanthropy Forum's

#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

#PhilanthropyDayOfAction in support of the #CharitableAct.

On October 4th, add your voice to the chorus of support for a universal charitable deduction by writing, calling, and/or posting on social media to ask your legislators to co-sponsor the bill!

UNITED PHILANTHROPY FORUM
A network for the common good

PHILANTHROPY DAY OF ACTION WILL:

- Include Simple Communication Methods to Advocate From Anywhere
- Include Resources for Engagement
- Help Make the Universal Charitable Deduction A Reality.

OCTOBER 4, 2023

For More Information:
bit.ly/PhilanthropyDayOfAction

PHILANTHROPY DAY OF ACTION

PSOs are uniquely positioned to lead in mobilizing the broader sector in support of the Charitable Act, which would incentivize millions of more Americans to give and support their communities by restoring the non-itemizer charitable deduction.

In addition to promoting the #PhilanthropyDayofAction to your foundation members, this toolkit also includes resources to help both PSOs and funders advocate in support of the Charitable Act.

In the next section you find background information, sample language, and resources to support PSO and foundation advocacy efforts for this legislation on the #PhilanthropyDayofAction, **October 4, 2023**.

Philanthropy Day of Action on October 4, 2023

The Forum urges PSOs and their foundation members to join the Philanthropy Day of Action in support of the Charitable Act on October 4th. **To participate, PSOs and their members can call, write, and post on social media to ask their lawmakers to co-sponsor the bill.**

Below are resources, scripts, and sample social media language that Forum member-PSOs and foundation leaders and staff can use to advocate for the Charitable Act.

Forum Advocate Action Center

On October 4, **the Forum encourages our member-PSOs and their foundation members to advocate for the Charitable Act with our [Advocate Action Center](#).** The Action Center includes a pre-written letter sent directly to Members of Congress in less than five minutes.



Script for Phone Calls

- Hello, my name is [YOUR NAME] and I'm calling on behalf of [YOUR ORGANIZATION] which represents [# OF FOUNDATIONS] in [Senator/Representative's NAME]'s [state/district/ or working on PSO issue-area].

As a strong supporter of charitable giving and in coordination with a national Philanthropy Day of Action, I am calling to ask you to join a bi-partisan group of your colleagues by co-sponsoring the Charitable Act (S. 566/H.R.3435). This bill would create a temporary charitable deduction for non-itemizing taxpayers.

In these difficult economic times, the universal charitable deduction would ensure that taxpayers can support local charity in [Senator/Representative's NAME]'s [state/district], without hurting their own pocketbook.

I urge you to co-sponsor the Charitable Act. Thank you in advance for your commitment to strengthening communities around the country.

Social Media Advocacy

In addition to the language below, Forum members can use the [Philanthropy Day of Action Resource Kit](#), which features social media graphics and District to D.C. Advocacy Network logos.

Sample Tweets for the Charitable Act

#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

- Dear [@REP./SEN. NAME], giving dropped 10.5% in 2022, only the fourth time it has declined since 1956, per @GivingUSA. [INSERT PSO NAME] urges you to address this troubling trend by co-sponsoring the #CharitableAct, which would create a universal charitable deduction incentivizing giving!
- Dear [@REP./SEN. NAME], more than 90% of taxpayers don't itemize their returns, meaning they don't receive a charitable deduction. [INSERT PSO NAME] urges you to co-sponsor the #CharitableAct and incentivize millions more Americans to give!
- Dear [@REP./SEN. NAME], when Congress enacted a temporary universal charitable deduction in 2020 it generated \$10.9B in giving that year. [INSERT PSO NAME] urges you to co-sponsor the #CharitableAct and help strengthen charitable giving!
- [INSERT PSO NAME] thanks [@REP./SEN. NAME] for being a co-sponsor of the #CharitableAct, which would strengthen incentives to donate at a time when there have been historic declines in giving. The charitable sector thanks [@REP./SEN. NAME] for [his/her/their] support!

Sample Posts for LinkedIn, Facebook, and other Platforms

- Dear [@REP./SEN. NAME], inflation-adjusted giving dropped 10.5 percent in 2022, only the fourth time it has declined since 1956. Additionally, charitable giving as a share of personal disposable income dropped to 1.7 percent – a near 30-year low.

[INSERT PSO NAME] and United Philanthropy Forum support the #CharitableAct, which would create a universal charitable deduction strengthening incentives for giving. As part of the #PhilanthropyDayOfAction, [@REP./SEN. NAME] we urge you to co-sponsor the Charitable Act!

- Dear [@REP./SEN. NAME], more than 90% of taxpayers don't itemize their returns, meaning they don't receive a charitable deduction. The #CharitableAct would create a universal charitable deduction, incentivizing millions more Americans to give to nonprofits and foundations supporting vital community services.

As part of the #PhilanthropyDayOfAction, [INSERT PSO NAME] and United Philanthropy Forum urge you to co-sponsor the Charitable Act!

- Dear [@REP./SEN. NAME], the charitable deduction works and is good tax policy. When Congress enacted a temporary universal charitable deduction in 2020, it generated \$10.9 billion in giving that year.

#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

As part of the #PhilanthropyDayOfAction, [INSERT PSO NAME] urges you to co-sponsor the #CharitableAct and help strengthen charitable giving!

- [INSERT PSO NAME] thanks [@REP./SEN. NAME] for being a co-sponsor of the #CharitableAct, which would strengthen incentives to donate at a time when where there have been historic declines in giving.
- [INSERT PSO NAME] joins the charitable sector on the #PhilanthropyDayOfAction to thank [@REP./SEN. NAME] for [his/her/their] support!

Sample Language for Opinion Pieces

Opinion pieces in local newspapers and industry publications are another effective way to advocate for the Charitable Act. In addition to the sample language included within this engagement toolkit, the Forum encourages members-PSOs to use the language from the links below when developing their own opinion pieces:

- [Charitable Act Policy Issue Brief](#),
- [Forum Advocacy Action Center](#), and
- [Recent blog from our President & CEO Dave Biemesderfer](#).

For assistance with writing an op-ed, the Harvard Kennedy School's [How to Write an Op-Ed or Column](#) may also be helpful.



#PhilanthropyDayOfAction for the #CharitableAct on October 4, 2023

Helpful Links

United Philanthropy Forum's public policy issue brief for the Charitable Act:

<https://www.unitedphilforum.org/resources/policy-issue-universal-charitable-deduction>

United Philanthropy Forum's Advocate Action Center, powered by VoterVoice:

<https://www.unitedphilforum.org/forum-advocate-action-center>

Philanthropy Day of Action Resource Kit, featuring social media graphics and District to D.C. Advocacy Network logos:

<https://www.unitedphilforum.org/resources/philanthropy-day-action-resource-kit>

Forum President & CEO Dave Biemesderfer's recent blog about the Charitable Act:

<https://www.unitedphilforum.org/news/latest-giving-data-underscores-need-charitable-act>

Harvard Kennedy School's How to Write an Op-Ed or Column:

https://shorensteincenter.org/wp-content/uploads/2012/07/HO_NEW_HOW-TO-WRITE-AN-OPED-OR-COLUMN.pdf



UNITED PHILANTHROPY FORUM
DISTRICT to D.C.
Advocacy Network

United Philanthropy Forum
Public Policy and Communications Staff

Matthew L. Evans

Senior Director of Public Policy
matthew@unitedphilforum.org

Tirrea Billings

Senior Communications Manager
tirrea@unitedphilforum.org

Nathaniel Borek

Senior Public Policy Associate
nate@unitedphilforum.org