

Advocating for Canadians and Charities



Strong Charities. Strong Communities.

Pop quiz – charitable, political, or prohibited?

Writing a letter to an MP or Minister

Meeting an MP or Minister

Endorsing a political party's position on an issue

Testifying in front of a Parliamentary Committee or public tribunal

Organizing a petition

Newsletter item saying Law X needs to change

Organizing a rally

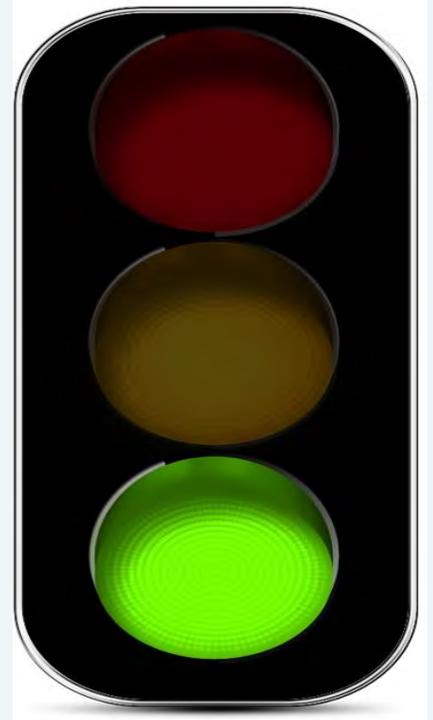
Talking to the media

Full-page newspaper ad reprinting a letter or submission you've made

Organizing an all-candidates meeting

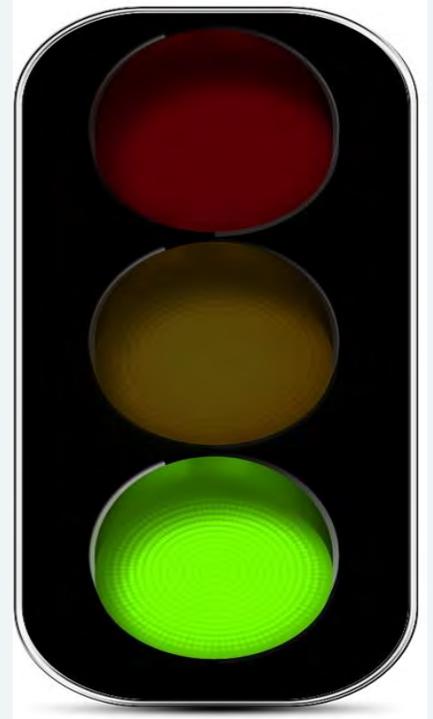
Charitable activities

- Meeting with or writing to MPs, cabinet ministers, public servants
- Appearing in front of a Parliamentary committee
- Appearing in front of a public tribunal



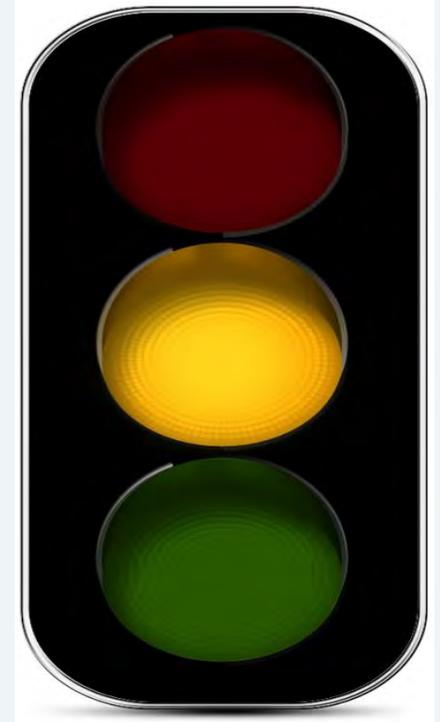
Charitable activities

- *Activities must be:*
 - *Connected and subordinate to charitable purpose*
 - *Non-partisan*
 - *Based on a well-reasoned position*
 - *No call to political action*



Political activity

- Organizing a rally, petition, or letter-writing campaign
- Buy ads to pressure the government
- Publicly share views that a law or policy should be changed or retained
- Essentially, a public call to action
- Funding others to do political activity



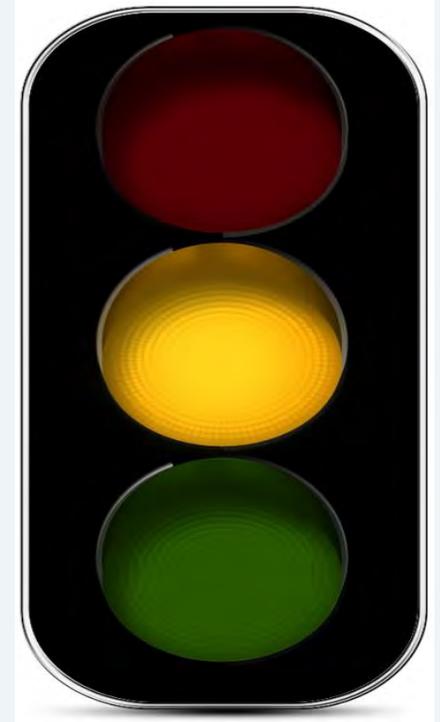
Political activity

All of these are fine with certain conditions

No more than 10% of resources used in any year

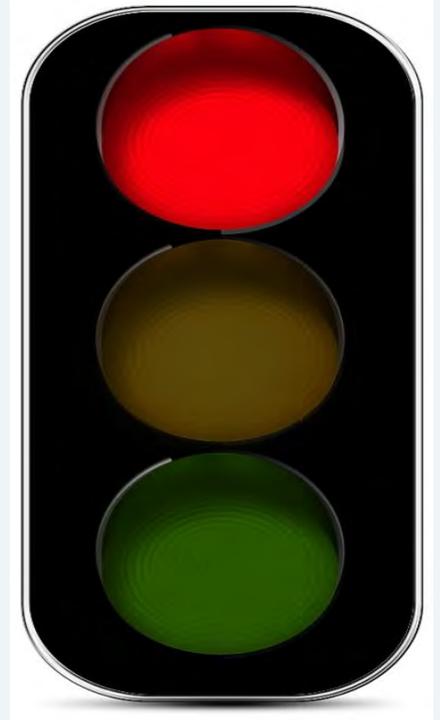
Related and subordinate to charitable purpose

T3010 reporting – even if there is no expenditure



Prohibited activity

- Illegal protests
- Partisan activity -- directly or indirectly supporting or opposing a political party or candidate
 - Endorsing or opposing a party platform
 - Encouraging supporters to vote for or against a party or candidate
 - Unequal treatment of candidates during an election period



**How many of you have ‘activated
your voice’ in the past 12
months?**

**Why should charities engage in
public policy?**

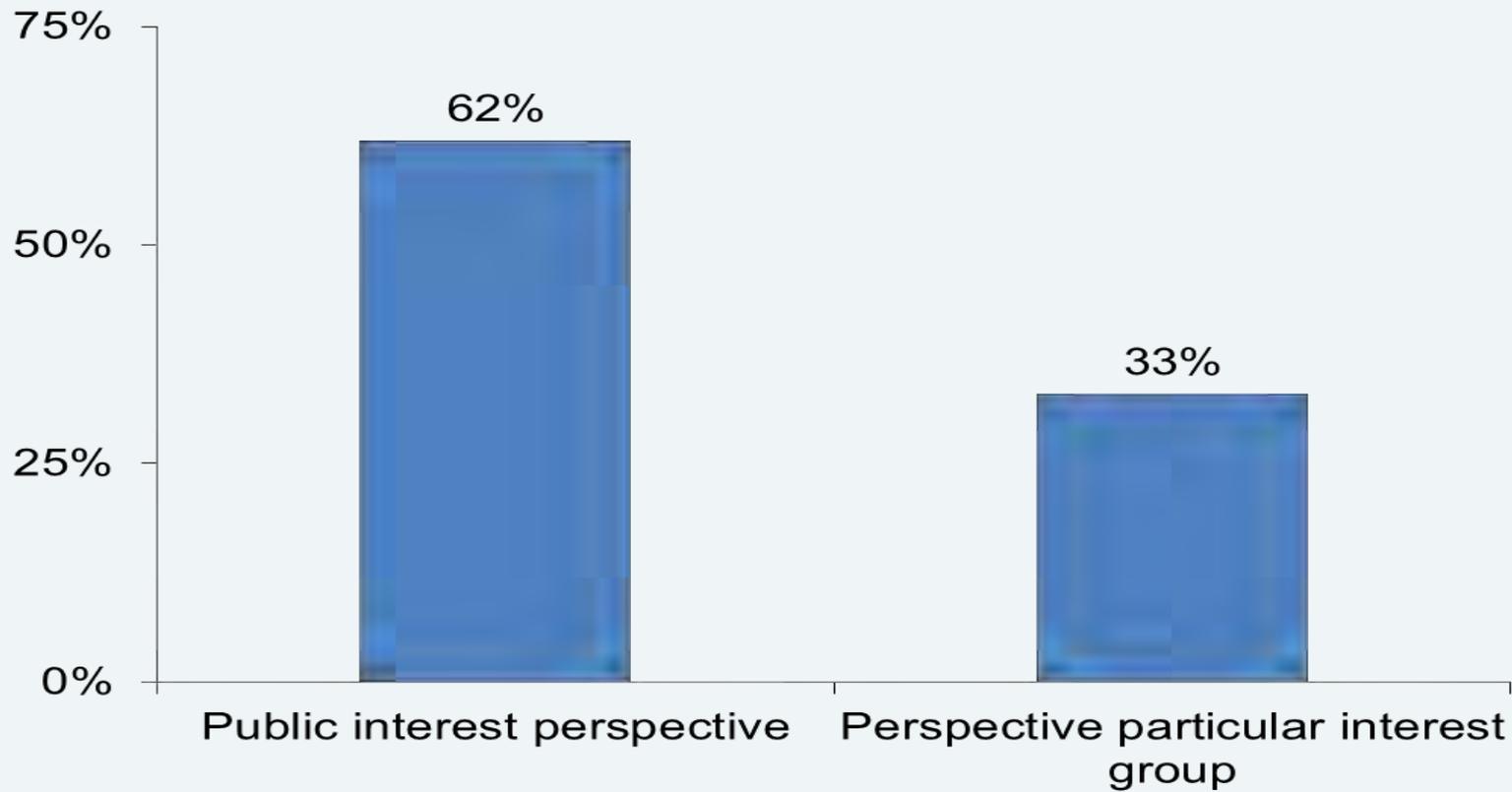
5 Key Reasons to engage in PP

1. Charities are on the front lines
2. Charities bring a unique perspective
3. Charities bring people together and provide a voice for communities

5 Key Reasons to engage in PP

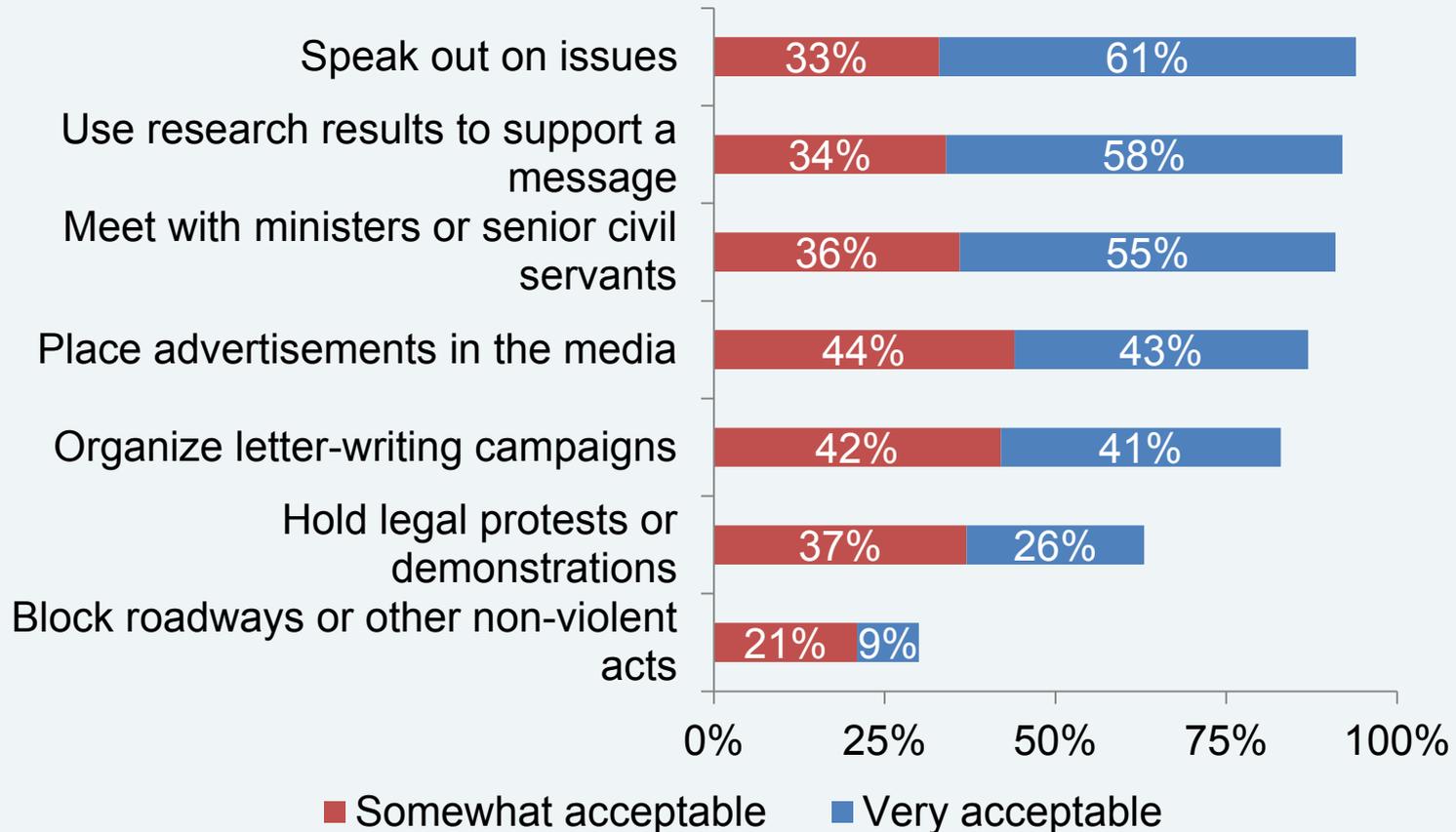
4. We have a long history of successfully informing and influencing government decisions
5. Canadians want and expect us to speak up

**Canadians believe that charities
prioritize the *public* interest, not
their own**



Source: Talking about Charities, 2013

**How do Canadians want charities
to engage?**



**How have charities influenced
public policy?**

Tobacco policy



Acid Rain Treaty



Land mines treaty



Impaired driving

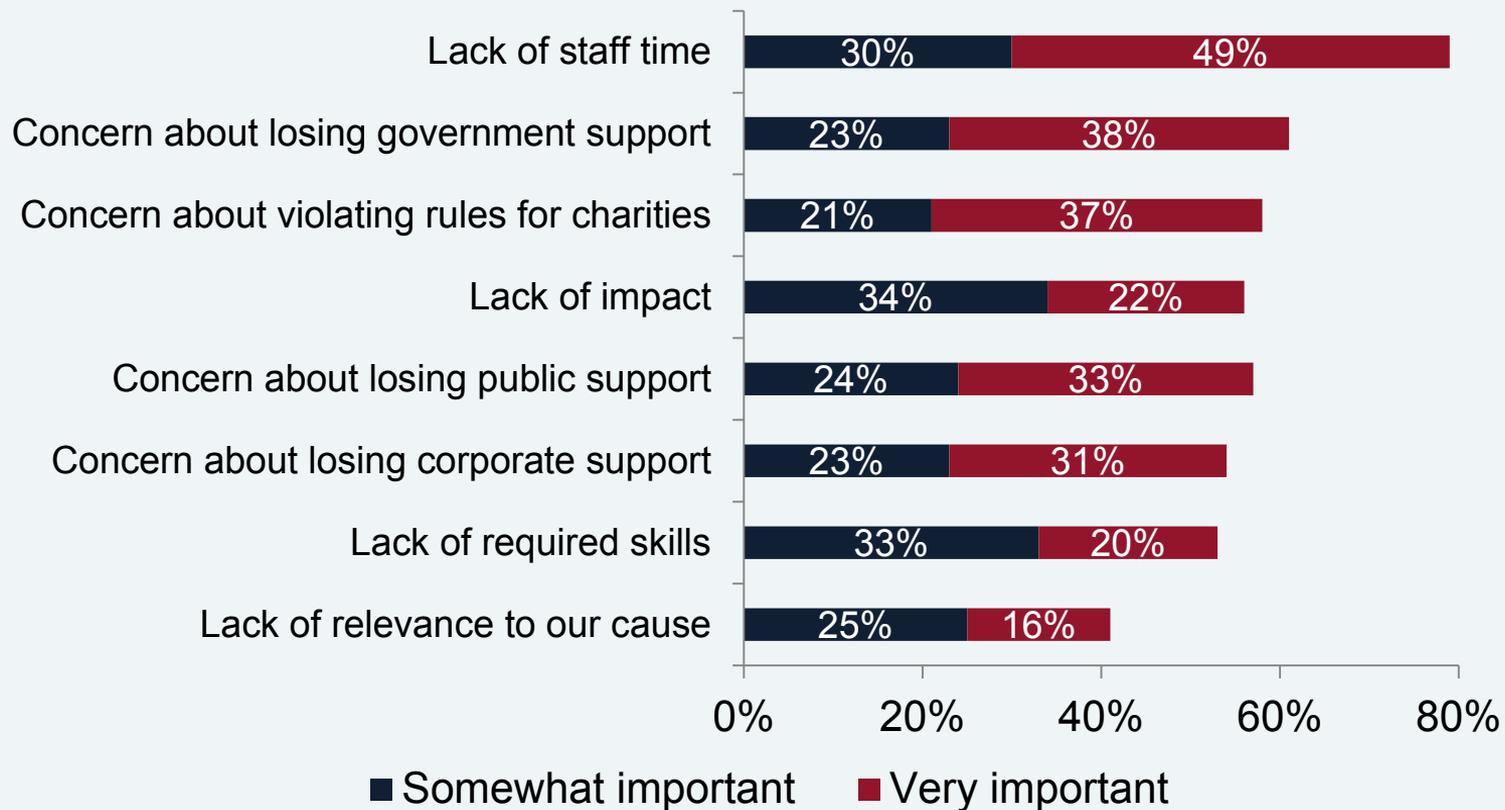


Children's Tax Credits: Fitness



**Why don't charities engage
more?**

**At your tables...talk about what
are the barriers to participating in
public policy**



What do charities need to keep in mind when they engage in public policy?

Types of activity

Charitable activity – advocacy that charities can carry out that is considered part of their charitable mission

Political activity – advocacy that charities can carry out – but there are limits to keep in mind and the activity **MUST** be reported on the T3010

Prohibited activity – charities must **NOT** engage in these – includes partisan activity

CRA definitions of political activity

When a charity:

“explicitly communicates a call to political action (i.e., encourages the public to contact an elected representative or public official and urges them to retain, oppose, or change the law, policy, or decision of any level of government in Canada or a foreign country)”

CRA definitions of political activity

When a charity...

“explicitly communicates to the public that the law, policy, or decision of any level of government in Canada or a foreign country should be retained (if the retention of the law, policy or decision is being reconsidered by a government), opposed, or changed”

CRA definitions of political activity

When a charity...

“explicitly indicates in its materials (whether internal or external) that the intention of the activity is to incite, or organize to put pressure on, an elected representative or public official to retain, oppose, or change the law, policy, or decision of any level of government in Canada or a foreign country”

What are the issues that your organization would speak about?

What would you recommend if we are trying to get your attention to support a federal initiative?

What are some frequently asked questions?

What do we need to know when conducting research?

If the research was carried out to better understand an issue and **does not contain a call to action**, it is **charitable**.

What do we need to know when conducting research?

If the research was carried out to better understand an issue, but includes recommendations that constitute a call to action, a portion of it may need to be counted as political activity.

**Being “indirectly” partisan seems a
bit broad.**

**Does that mean we can't criticize the
government?**

Speak to the issue and your policy position, not for or against a party, candidate, or politician.

Refer to governments and institutions in a neutral way. For example, “the federal government” rather than “the Conservative/Green/Liberal/NDP government.”

If you’re reporting on how MPPs voted on something, give the complete list – don’t single one party out.

“What is considered offside re: social media?”

Charity volunteers, employees or directors are not restricted from making partisan comments in public, as long as they make clear that they are not representing a charity.

Charities that use social media to post information cannot use the forum to make partisan statements.

“What is considered offside re: social media?”

The information posted should avoid linking to statements made by a person or organization that are supportive or in opposition to a political party or candidate.

When inviting the public to comment on your social media forum, partisan comments should be removed within a reasonable time.

**What does this mean for
you?**

As a board member...

Be aware of, involved in, and supportive of, the organization's decisions to engage in public policy.

Be aware of the distinction between political activity and other types of activity.

Don't just rubber-stamp the T3010 – know what questions to ask, and don't be afraid to ask them.

As senior staff...

- educate relevant staff
- keep track of activities that need to be reported
- track direct expenditures (e.g. permit costs, advertisements if organizing a rally)
- track staff time devoted to political activities
- if you make grants to another charity, with the intent that a portion be used for political activity, track and report
- no “one size fits all” method, no prescribed method from CRA – whatever you do should be consistent and reasonable

**Finally,
we need your voice to be
heard**

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@ImagineCanada @macdjb