



Lobby Days

October 12 – 16, 2009

Washington, DC

Information Packet



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September 2009

Dear Partnership Member:

Thank you for your interest in the Partnership for Philanthropic Planning's 2009 Lobby Days. This event, to be held October 12-16, 2009 in conjunction with the National Conference on Philanthropic Planning, will provide you with an opportunity to meet with your Senators and Representative and speak out on major charitable giving legislation now before Congress.

As the national charity serving people and organizations that work together to make charitable giving most meaningful, the Partnership brings *your voice* to Members of Congress as they set federal policy that affects nonprofits, donors, and their advisors. Day in and day out, the Partnership strives to protect the charitable tax deduction while pushing for new giving incentives like the IRA Charitable Rollover. We also work on other important issues like estate tax reform, nonprofit governance, and regulation affecting philanthropic planning.

The Partnership is an effective force on Capitol Hill only because our members are actively engaged and knowledgeable on the issues that matter most, and now more than ever, we need your help. As Congress considers significant revisions to the charitable deduction, Members of Congress need to hear directly from you on how this change will impact America's many charities and your donors or clients.

The following pages will provide you with the background information and materials you need to become a lobbyist for the week. We have included step-by-step instructions on how to schedule meetings with your Senators and Representative, directions to Capitol Hill, suggested meeting topics and talking points, some lobbying do's and don'ts, and a post-meeting "report card," which will inform the Partnership of the progress you make and allow us to follow-up on your meetings.

As always, please contact us with any questions, and I look forward to seeing you in Washington, DC!

Sincerely,

A handwritten signature in black ink, appearing to read "Tanya Howe Johnson".

Tanya Howe Johnson
President and CEO



How to book meetings with your Members of Congress (in just six easy steps)

Step 1. Find out who represents you in Congress.

Visit <http://www.congress.org> and next to “Find your officials,” enter your zip code. This will provide you with the name and contact information for your two Senators and one Representative.

Step 2. Get their contact information.

Click on the name of each Senator and your Representative. Click on the “contact” tab and note the Washington, DC office location, the office phone number and office fax number. Click on the “staff” tab and note the name of the scheduler.

Step 3. Draft your request letters.

Send a separate letter to each Senator and your Representative requesting an in-person meeting for whenever your schedule permits during October 12-16, 2009. Sample letters can be found on the following page.

Step 4. Fax your letters.

Fax (do NOT mail or email) the appropriate letter to the attention of the scheduler for each Senator and your Representative.

Step 5. Follow-up with a phone call.

One to two days after faxing your letter, call the main number of the Washington, DC office of each Senator and your Representative to follow-up on your request. Ask to speak with the scheduler (who should have received your letter via fax). If your Senator or Representative can meet with you, confirm the exact time and location of the meeting. If your Senator or Representative is unable to meet with you, tell the scheduler you would like to meet with whichever staff person handles tax matters for the Member of Congress.

Step 6. Confirm your meeting(s).

Before leaving for Washington, DC, call the scheduler (or the individual staffer with whom you will meet) to once again confirm the exact time and location of your meeting.



Sample letter requesting a meeting with your Member of Congress

September ____, 2009

The Honorable _____
United States Senate/U.S. House of Representatives
Washington, DC 20510 (Senate)/ 20515 (House)

Dear Senator/ Representative _____,

I am writing to request a brief meeting with you to discuss charitable giving issues currently before Congress. I will be on Capitol Hill on *[available dates and times]* and hope we can meet at some point during that time.

A resident of *[city]*, I currently work at *[name of organization]*, which is *[description of organization]*. In my capacity as *[title]* at *[name of organization]*, I am a member of the Partnership for Philanthropic Planning, a public charity whose mission is to help people and organizations create charitable giving experiences that are most meaningful. In mid-October, I will be in Washington for the Partnership's National Conference on Philanthropic Planning and would like to discuss with you federal legislation that is now pending in Congress and would greatly affect America's many charities. If your schedule does not permit you to meet with me, I hope to meet with your staff member that handles tax issues.

I will follow up with your office by phone in the next few days. In the meantime, I can be reached at *[telephone]* or *[e-mail]*. Thank you for considering my request.

Sincerely,

[Name]
[Title]
[Organization]



Directions to Capitol Hill

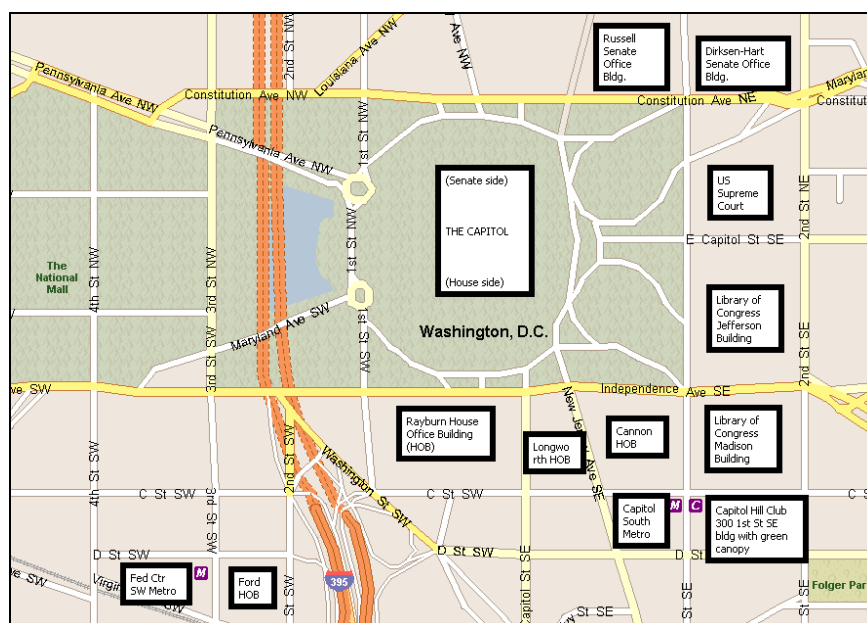
Parking in the Capitol Hill area is very limited so you are encouraged to use Metro or take a taxi.

To reach the House side (south side of Capitol) via Metro, take the Blue Line or the Orange Line to the Capitol South stop. Then, there are three different House Office Buildings where your meeting could take place:

- Rayburn House Office Building is south of the Capitol bounded by Independence Avenue, South Capitol Street, C Street SE, and First Street SE.
- Longworth House Office Building is south of the Capitol bounded by Independence Avenue, New Jersey Avenue, C Street SE, and South Capitol Street.
- Cannon House Office Building is south of the Capitol bounded by Independence Avenue, First Street SE, New Jersey Avenue, and C Street SE.

To reach the Senate side (north side of Capitol) via Metro, take the Red Line to the Union Station stop. Then, there are three different Senate Office Buildings where your meeting could take place:

- Russell Senate Office Building is north of the Capitol bounded by Constitution Avenue, First Street NE, Delaware Avenue, and C Street NE.
- Dirksen Senate Office Building is northeast of the Capitol on a site bounded by Constitution Avenue, C Street NE, First Street NE, and Second Street NE, next to the Hart Senate Office Building.
- Hart Senate Office Building is northeast of the Capitol on a site bounded by Constitution Avenue, C Street NE, First Street NE, and Second Street NE, next to the Dirksen Senate Office Building.





Suggested meeting topics and talking points

The Partnership recommends you cover at least two topics during your meeting: (1) proposals to limit the value of the charitable deduction and (2) the IRA Charitable Rollover. Below please find suggested talking points. Additional information on these and other issues can be found at: <http://www.pppnet.org/government/index.html>.

1. *Proposals to Limit the Value of the Charitable Deduction*

Background:

Under current law, taxpayers earning more than \$200,000 annually and families earning more than \$250,000 annually can take itemized deductions at a rate equal to their marginal tax bracket, 33 percent or 35 percent, respectively. In his fiscal year 2010 budget, President Obama has proposed limiting itemized deductions for these taxpayers at a 28 percent rate beginning in 2011. The revenue raised by this change would be used to offset the cost of healthcare reform. A modified proposal has also been suggested that would limit itemized deductions to 33 percent or 35 percent for taxpayers whose income tax brackets would increase to 36 percent or 39.6 percent, respectively, in 2011.

Suggested Talking Points:

- Proposals that would reduce the value of charitable deductions for certain donors represent a step in the wrong direction, especially during these economic times. As charities struggle to meet increased demands for their services with shrinking resources, we need to encourage all individuals, regardless of income and wealth, to give to charity.
- According to a 2008 Bank of America Study on High Net-Worth Philanthropy, high net-worth households (household income greater than \$200,000 and/or net worth of at least \$1 million) give between 65 and 70 percent of all individual giving in America. These are the taxpayers who have the resources to give to charitable causes consistently, and U.S. tax policy should encourage them to continue to give generously.
- In addition, a recent study conducted by Michelle and Robert Yetman at the University of California at Davis found that donations to charities that appeal to higher human needs, such as education, arts and culture, and environmental causes, are very sensitive to tax incentives. The authors suggest that decreasing the value of the charitable tax deduction will likely decrease the amounts of donations received by these types of charities.



- Charities often step in to fill the gap when government and the private sector are unable to provide adequate services or support. After natural disasters such as Hurricane Katrina and the recent Midwest floods, Congress provided additional incentives for individuals to make charitable donations. Limiting the value of itemized deductions would do the exact opposite – it would increase the cost of giving during a challenging fundraising climate. States facing budget crunches have recognized the value of charitable incentives. For example, New York has exempted charitable contributions from its limits on itemized deductions for taxpayers earning more than \$1 million annually.
- The true beneficiaries of the charitable deduction are not the generous Americans who make charitable gifts, but all citizens whose local communities, nation, and world are made better through the work of charitable organizations. Tax incentives for charitable giving send a message that helping others is a core value to be encouraged. The charitable deduction is not a matter of providing a reward or something of value to the taxpayer; rather it is a matter of encouraging those with financial means to use their wealth to help those without.
- Nevertheless, while high-income taxpayers probably would continue to give if a limitation is enacted, it will likely affect the timing and size of their gifts. Even though the proposals would not take effect until 2011, we are already hearing from our members that donors are delaying gifts and multi-year pledges.
- The charitable deduction is unlike other itemized deductions whereby it encourages people to voluntarily give away their money for the benefit of others. If anything, incentives for this type of behavior should be enhanced, not limited.

2. *IRA Charitable Rollover*

Background:

The IRA Charitable Rollover tax incentive, which expires at the end of 2009, allows individuals aged 70½ and older to donate up to \$100,000 from their Individual Retirement Accounts (IRAs) and Roth IRAs to public charities without having to count the distributions as taxable income. It will take congressional action to extend the giving incentive into 2010 and beyond. The Public Good IRA Rollover Act of 2009 (S.864/H.R.1250) would build on the success of the current IRA Rollover by making it permanent, removing the current dollar limit on donations per year, making all charities eligible to receive donations, and providing IRA owners with a planned giving option starting at age 59½.



Suggested Talking Points:

- Since enactment in August 2006, the IRA charitable rollover has proven to be a simple, efficient and effective means for older Americans to give back to their fellow citizens, and to the causes and communities they believe in.
- By eliminating the barrier in the tax law that had discouraged transfers from individual retirement accounts, the IRA charitable rollover has generated a significant amount of new charitable giving to charities and enabled them to maintain or expand services and individuals throughout the country.
- The IRA charitable rollover enables Americans aged 70½ and older to make millions of dollars of new contributions to nonprofits without suffering adverse tax consequences.
- The IRA charitable rollover is particularly helpful for older Americans who do not itemize their tax deductions and would not otherwise receive any tax benefit for their charitable contributions.
- The resulting gifts from IRA charitable rollovers – ranging from as little as \$10 to the legal maximum of \$100,000 – have helped organizations build cancer centers, develop programs for counseling at-risk youth, support housing for homeless families, conserve wilderness areas, and provide art therapy for people with developmental disabilities.
- *[Explain how your organization has used donations from IRA rollovers to have an impact in your community.]*
- Congress must act to extend the IRA charitable rollover before it expires on December 31, 2009.
- The Public Good IRA Rollover Act of 2009 (S.864/H.R.1250) would build on the success of the current IRA Rollover by making it permanent, removing the current dollar limit on donations per year, making all charities eligible to receive donations, and providing IRA owners with a planned giving option starting at age 59½.
- *[Explain how your organization currently puts donations to work in the community from donor advised funds, supporting organizations, and/or planned giving programs – none of which is permitted to receive IRA charitable rollovers without the donor experiencing adverse tax consequences.]*



- *[Ask Senators and Representative to extend and expand this incentive by becoming a cosponsor and passing the Public Good IRA Rollover Act (S.864/H.R.1250) by contacting Allen Huffman in Senator Dorgan's office and Diane Oakley in Representative Pomeroy's office.]*



Do's and don'ts for meetings with Members of Congress

Do's...

- Do learn the Member's committee assignments and where their specialties and interests lie.
- Do use data or cases to illustrate relevance of issue.
- Do relate situations on the local level.
- Do ask for their position on the issue and why.
- Do ask why he/she voted a particular way.
- Do show openness to the knowledge of counterarguments and respond to them.
- Do admit when you don't know. Offer to try to find out the answer and send information back to the office.
- Do spend time with policy makers whose position is against yours. You can lessen the intensity of the opposition and perhaps change it.
- Do spend time developing relationships with staff.
- Do thank them for stands they have taken which you support.

Don'ts...

- Don't overload a Congressional visit with too many issues.
- Don't confront, threaten, pressure or beg.
- Don't be argumentative. Speak with calmness and commitment so as not to put him/her on the defensive.
- Don't overstate the case. Decision-makers are busy and you're apt to lose their attention if you are too wordy.
- Don't expect elected officials to be specialists. Their schedules and workloads tend to make them generalists.
- Don't be put off by smokescreens or long-winded answers. Bring them back to the point.
- Don't make promises you can't deliver.
- Don't be afraid to take a stand on the issues.
- Don't be offended if a legislator requests that you meet with his/her staff.



Partnership for Philanthropic Planning
Lobby Day Report Card

Please submit a separate form for each meeting you attend. Be as complete as possible. The information you provide will assist the Partnership with its lobbying efforts throughout the year.

Please submit completed forms:

To Partnership staff during conference registration, or

Fax to: 317-269-6276

Email to: info@pppnet.org

What is your name and contact information?

Name: _____

Organization: _____

Telephone: _____ E-mail: _____

Did anyone else attend the meeting with you?

Name: _____

Organization: _____

Name: _____

Organization: _____

Which Congressional office did you visit?

Senator/Representative: _____

State/District: _____

What was the date and time of your meeting?

Date: _____ Time: _____

Was the Member of Congress present?

Yes No



Which Congressional staffer was present?

Name: _____

Title: _____

What issues were discussed? Be specific.

Did Member or staffer indicate a preference (no matter how slight) on any of the issues discussed? Pay attention to both verbal and non-verbal cues.

Did Member or staffer express any concerns?

Did Member or staffer make any commitments or promises?

Did the Member or staffer request more information?

Did you promise any follow-up?

How would you rate your overall meeting? Provide any details you think are relevant.