

Chapter 1: Basic Elements for Creating a Lasting Citizen Advocacy Group

A citizen advocacy group (CAG) can be a formalized organization, complete with articles of incorporation, 501(c)(3) tax status, a board of directors, paid staff, and an active membership. Or, a CAG can be an informal group of concerned people meeting around a kitchen table to discuss ways to improve long-term care in their community. A recent survey of CAGs throughout the country showed that the majority of groups are started by an individual who was troubled by the care received by a loved one in a long-term care setting.

The information in this chapter was designed to provide both basic information to informal groups looking to formalize their structure and ideas for formalized groups working to expand their base or cultivate leadership from within the group. Specifically, the chapter addresses the following questions:

- 1) What is a mission statement? Does our CAG need a mission statement?
- 2) How should a CAG be structured?
- 3) Does a CAG need to incorporate? If so, how do you incorporate?
- 4) How does a CAG establish an effective board of directors?
- 5) How does a CAG develop governing bylaws?
- 6) What other resources are available to a new CAG?
- 7) How does a CAG form a base and expand membership?

1) **Mission Statement**

Experts agree that developing a clear mission statement is essential to creating a successful organization. [BoardSource](#), a nationally recognized organization that works to strengthen nonprofit boards of directors, clearly explains the importance of a mission statement by answering the basic question [why do we need a mission statement?](#)

The [Alliance for Non-Profit Management](#), an association of nonprofit management professionals and organizations, also addresses the need for a mission statement in its discussion of [what's in a mission statement?](#) The section suggests what should be included in a mission statement and how to write one.

When developing your mission statement, it can be very helpful to view other [CAG mission statements](#) from active CAGs nationwide.

2) **Organizational Structure**

Developing a mission statement is only one step in the process of formalizing an organization. Some groups may decide to immediately establish an official organizational structure even before to deciding if they will incorporate.

Some issues to consider when developing the structure of your CAG include:

- What is the desired hierarchy of the organization (i.e. one president or co-presidents)?
- How is membership defined (i.e. what constitutes a member, dues or no dues)?
- What external support and obstacles exist (i.e. contacts in the community, the industry's response)?

For example, in 2002-2003, several Georgia State University graduate students joined together to start a long-term care citizen advocacy group known as the Georgia Advocates for Nursing Home Reform (GANHR). In this case, the founders had limited time to establish the group and therefore chose not to pursue incorporation initially. However, in an attempt to provide structure to their young group, they created the following documents that can be used as samples for other advocates:

[A Model for Formalizing Structure](#)

[Membership Form](#)

[Organizational Support Agreement](#)

[Recruitment Flyer](#)

Unfortunately, after months of developing a structure, setting priorities, and gaining support, GANHR dissolved due in part to the relocation of a few of its founding members. One common mistake of young groups is to rely too heavily on only a few dedicated people. Thus, an important lesson was learned about the sustainability of CAGs. To ensure the vitality of a CAG, a solid base and diverse leadership must be established as quickly as possible.

3) **Incorporation**

When considering the long-term structure and sustainability of your organization it is important to consider the pros and cons of incorporation. Proponents of incorporation point out that most donors and funders will not give money to organizations that are not incorporated as a nonprofit. Furthermore, incorporation can legitimize your organization to constituents and policy makers. However, it is important to consider the additional responsibilities associated with becoming incorporated.

[Grassroots.org](#), an organization that promotes citizen action offers free nonprofit incorporation assistance to qualifying groups. A project of Grassroots.org titled [Nonprofitmanagement.org](#) provides an extensive list of the advantages and disadvantages of becoming incorporated as well as a five step plan for incorporating your group.

The U. S. Department of Agriculture developed a concise [501\(c\)\(3\) fact sheet](#) that includes a valuable section on common mistakes made by new 501(c)(3) organizations.

After deciding to incorporate, it's time to officially apply for your 501(c)(3) tax status from the IRS. At first glance, these forms can appear overwhelming. However, www.form1023help.com, demystifies the nonprofit application process by providing specific, page by page assistance.

The IRS also provides a detailed [FAQ page](#) that explains the application process and requirements for tax exempt organization.

Note: It is important to recognize the inherent lobbying restrictions of a 501(c)(3) tax-exempt organization. [OMB Watch](#), a nonprofit watchdog group that works to promote open government, accountability, and citizen participation, developed a useful fact sheet that addresses [permissible lobbying for 501\(c\)\(3\) organizations](#). Specifically, the fact sheet answers three important questions: (1) Is lobbying by nonprofits permitted? (2) Is discussion of policy matters considered lobbying? (3) Can nonprofits that receive federal grants lobby?

On their website, [The Alliance for Justice](#) maintains a series of concise answers to commonly asked questions regarding [lobbying by nonprofits](#) and a brief explanation of [nonprofit advocacy basics](#). The advocacy basics section includes an easy-to-read chart comparing the characteristics of 501(c)(3), 501(c)(4), and 527 nonprofit organizations.

Do your members and/or board of directors need encouragement to engage in lobbying? Read "[10 Reasons to Lobby for your Cause](#)" written by the [Independent Sector](#), a nonprofit organization that works to promote the common good by supporting and engaging nonprofits.

4) **Establishing a Board of Directors**

Developing an effective board of directors is fundamental to the overall success of a nonprofit. Organizations such as BoardSource work solely to increase the effectiveness of boards of directors throughout the country. BoardSource created a free, downloadable e-book titled, "[Starting a Non-Profit Organization: Turning Vision Into Reality.](#)" Sections in this book answer the following questions: Do we need to have a board of directors? How big should the board be? How often should the board meet? Who should be on the board? Working with non-profit board governance experts, BoardSource also developed, "[Twelve Principles of Governance that Power Exceptional Boards.](#)"

One of the ongoing challenges that nonprofit organizations face is recruiting effective board members. [Guidestar](#), an internet resource designed to create a more transparent and accountable nonprofit community, published an article titled, "[Finding Effective Board Members](#)" to address this challenge. The article offers five practical tips for identifying valuable board members.

5) **Bylaws**

One of the first responsibilities of a new nonprofit board is to write the bylaws that will govern the organization. Bylaws are in essence the “constitution” of the organization. The [Foundation Center](#) offers several [examples of nonprofit bylaws](#).

For sample bylaws from the Massachusetts Advocates for Nursing Home Reform (MANHR) and the Kansas Advocates for Better Care (KABC), please see below:

[MANHR bylaws](#)

[KABC bylaws](#)

6) **General Resources for Starting a Non-Profit Organization**

Though there are numerous resources on the web to help you start your CAG, the following were chosen for their applicability to CAG work and user friendliness.

The [Foundation Center](#) offers a tutorial titled “[Establishing a Non-Profit Organization](#).” The tutorial walks you through 12 important steps involved in creating a nonprofit organization.

The [California Advocates for Nursing Home Reform \(CANHR\)](#) developed a helpful paper titled “[How to Organize a Nursing Home Advocacy Group](#).” The paper offers important tips including how to establish on-going funding, strategies for community outreach, and ideas for projects or services that your organization can provide.

The [Free Management Library](#) is an online community resource designed to support the organizational development of nonprofit organizations. The section titled [Starting a Nonprofit Organization](#) offers extensive nonprofit managerial advice including checklists for how to register your organization.

Finally, the organization [Action Without Borders](#) maintains an excellent resource called “The Nonprofit FAQ” on their website. “The Nonprofit FAQ” is a compilation of frequently asked questions and their answers based on on-line communications about nonprofits. The questions and answers were compiled beginning in the 1990s. In the article “[Five Tips and a Warning](#),” the editor of “The Nonprofit FAQ” offers advice about starting your own nonprofit organization and provides links to several additional resources.

7) **Building a Base**

Developing a strong base, in the form of members or regular supporters, is an ongoing challenge for nonprofit organizations. Below please find various strategies used by CAGs to increase membership and gain support.

One start-up CAG from Georgia used a [petition](#) to garner support for their priority issue and to identify people who supported their cause. One founding member of GANHR sent the petition to everyone on her holiday card list and asked them to pass around the

petition at their religious gatherings and meetings. The result was 700 signatures within weeks. Of the 700 signatures, 400 had readable contact information that was then added into an accessible database for future contact.

[Voices for Quality Care \(LTC\), Inc.](#), an active, all-volunteer, Maryland-based CAG, shared ideas for ways to increase membership in a document titled, “[Five Strategies to Increase CAG Membership.](#)”

In their April 2006 newsletter, the [Missouri Coalition for Quality Care \(MCQC\)](#) included the following statement.

MEMBERSHIP DRIVE . . .

As an integral part of our organization we challenge you — our members, readers and correspondents — to help us increase our membership by at least 120 new members this year. Please support our efforts by participating in this endeavor.

You can:

- Ask a friend or relative to join MCQC
- Spread the word about our website
- Request MCQC brochures to distribute at public offices, etc.
- Speak to your club or organization about MCQC