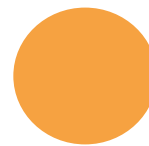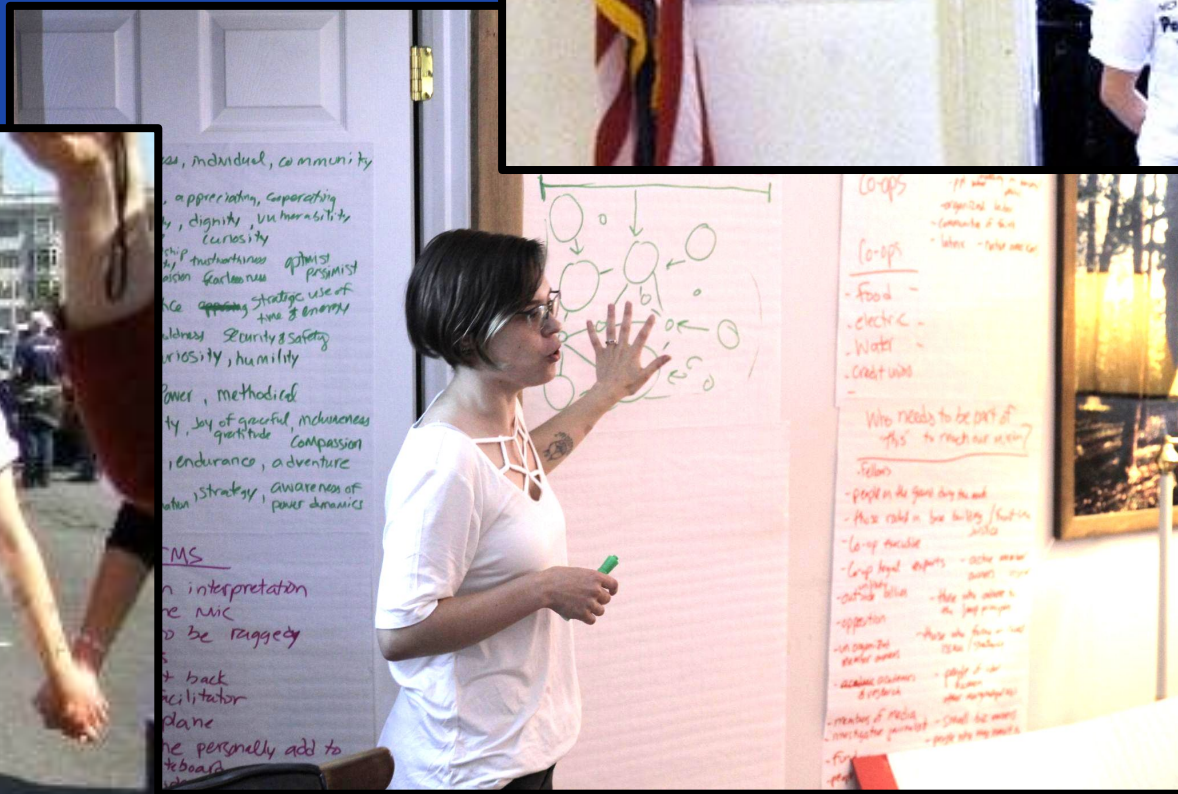# Base Power Learning Community

Base Power Learning Series:
Base Building & Multi-Entity Membership Models

About Jay

ABOUT US

The **Base Power Learning Community** brings together progressive intermediaries and leaders to learn, document innovation, and create resources for multi-entity organizations building membership across their legal entities.

NLA collaborates with those building durable progressive power for the progressive movement.

NLA runs capacity-building programs focused exclusively on supporting progressive organizations and ecosystems to use multiple legal entities to build power, increase impact, and win.

The Base Power Learning Community is Hosted and Sponsored by:

Register for all webinars here:
https://rebrand.ly/basepower

1. You're there now!
2. **501(c)3 and (c)4 Membership Programs: Navigate the Law**
3. **Using Your 501(c)4 to Engage Your Membership**
4. **Power of the Membership**: How to Engage Your Members For Endorsements
5. **Resourcing The Base**: c(3)/c(4) Fundraising and Communications
6. **Membership and Data**: Do You Have Consent For That?

NLA – Core Beliefs That Guided Creation of This Webinar

1. **We recognize & name the complexity of base building work**

We know that base building work within the constraints of existing funding practices, operating within multi-entity nonprofits and other structural and ecosystem limitations is hard. We seek to recognize, name and discuss that complexity in all its messiness.

Core Beliefs Cont'd

2. We take a learning stance to disrupt the traditional expert-learning mode

As progressive intermediaries, we are here to learn. We acknowledge the deep wisdom, lived experiences, and knowledge of the leaders we work with who execute base building in the field. And while we all have expertise, we reject a narrow definition of "expert" and strive for transformative learning that disrupts the typical "expert-learning" dynamic in all our work.

Core Beliefs Cont'd

3. We believe in collaboration

Given the complexity of our work, we believe collaboration is a powerful tool required for our shared learning journey. We recognize that addressing the challenges of base-building strategy will take all of us – intermediaries, leaders, and funders. We acknowledge that effective base-building strategy requires a holistic approach that integrates the advice and learning from different perspectives within our ecosystem and across different departments within organizations.

Core Beliefs Cont'd

4. We aspire to change structural limitations

We believe that building power for our communities requires a shift in how our entire ecosystem supports, invests in, and understands multi-entity organizations. We are committed to shifting beliefs and practices about how funders and intermediaries engage with multi-entity work. To that end, we seek to deepen our entire ecosystem's understanding of the critical role of multi-entity base-building.

NORMS

- **This is a learning space**: What we learn here will also help us build better content for the movement in the future. You are contributing to movement learning–so please respond/share
- **Take care of you**: Break in less than an hour

- **Privacy and data collection**
  - What is said or learned here will not be attributed to you or your organization in any way.
  - We aren't going to sell your info – we promise!
  - We are recording so we can share the presentation with others – but all questions or speaking from the audience and all attribution to any individual or group will be edited out (other than the shoutouts we will give with permission)

Schedule with Breaks

12:05 – 12:35 3:05 – 3:35	12:35 – 1:00 3:35 – 4:00	1:00 – 1:10 4:00 – 4:10	1:10 – 1:40 4:10 – 4:40	1:40 – 2:00 4:40 – 4:40
Welcome Intro Key Definitions	**Frameworks for Power and Engagement**	**Ten Minute Break**	**Membership Models + Breakout**	**Membership Models: Considerations and Process Thank Yous Evaluation**

Key Definitions For Shared Understanding

Everyone uses different terms and that's ok-- but we need to have common language for this webinar

WELCOME TO THE NERD ZONE, MY FRIEND

We suggest that whatever you take from this webinar – you develop a plan to get clear about what terms your organization wants to use.

ADVOCACY

Sustained actions taken to achieve policy wins or systems change. Synonymous with campaigning for this training.

–Education of the public
–Both c(3) and c(4)

*Via Advocacy That Builds Power, Center for Evaluation Innovation

ADVOCACY – EXAMPLES

c(3) Example: Pressuring a legislator in their capacity as legislator to vote for or against a particular policy

c(4) Example: Connect pressure of that legislator to their candidacy in an election (tie policy position to an endorsement or recommendation to vote for or against a candidate)

ORGANIZING*

Aims to grow collective capacity to act, invests heavily in growing and training leadership, organizes organizers and shares the responsibility to recruit and train leadership to have growing levels of agency *

*Via Hahrie Han, *How Organizations Develop Activists*

MOBILIZING*

"Mobilizers build power by focusing on transactional outcomes like building the association's membership. They try to get as many people involved as possible, but they do not try to transform or cultivate volunteers' capacities for further activism." *

*Via Hahrie Han, *How Organizations Develop Activists*

Organizing <3 Mobilizing

Who Is Who?

Supporter

Anyone who supports & you have a way of getting in touch with

Base

This is the community that your leadership comes from. Who you need to win. This may be your best donor and engagement community––the people most likely to take an action with you if you ask them to

Two Types of Base

Mass Base

Who you need to mobilize to win: Must be able to move a broader constituency than just your most engaged supporters

Deep Base

People you see at the center of making your social change. Your most engaged supporters, your leadership, or super-activists.

Membership   Vs.   Base

Base Building

"A diverse set of strategies and methods to support community members to: be in relationship with one another; invest in each other's leadership; share a common identity shaped by similar experiences and an understanding of the root causes of their conditions; use their collective analysis to create solutions and strategize to achieve them. Base building is at the core of the capacity to organize communities and is central to the set of functions that contribute to and amplify community power building within an ecosystem" *

*Via *USC Equity Research Institute*

Power & Strategy
Frameworks to guide the work.

Special thanks to a report called *Changing States: A Framework for Progressive Governance* from The Equity Research Institute at USC

Two questions we hope you leave here thinking about:

1. What kinds of power do we need to build to win critical victories for our community or base?

2. What role will our members/base play in our efforts to contest for power? What levers can our members/base effectively push?

6 Arenas of Change (Levers) *

Electoral

Voters are the final decision makers

Legislative

Elected officials and policy makers are the decision makers

Judicial

Decision makers are state-level courts and judges

Changing States: A Framework for Progressive Governance from The Equity Research Institute at USC

6 Arenas of Change Cont'd *

Administrative

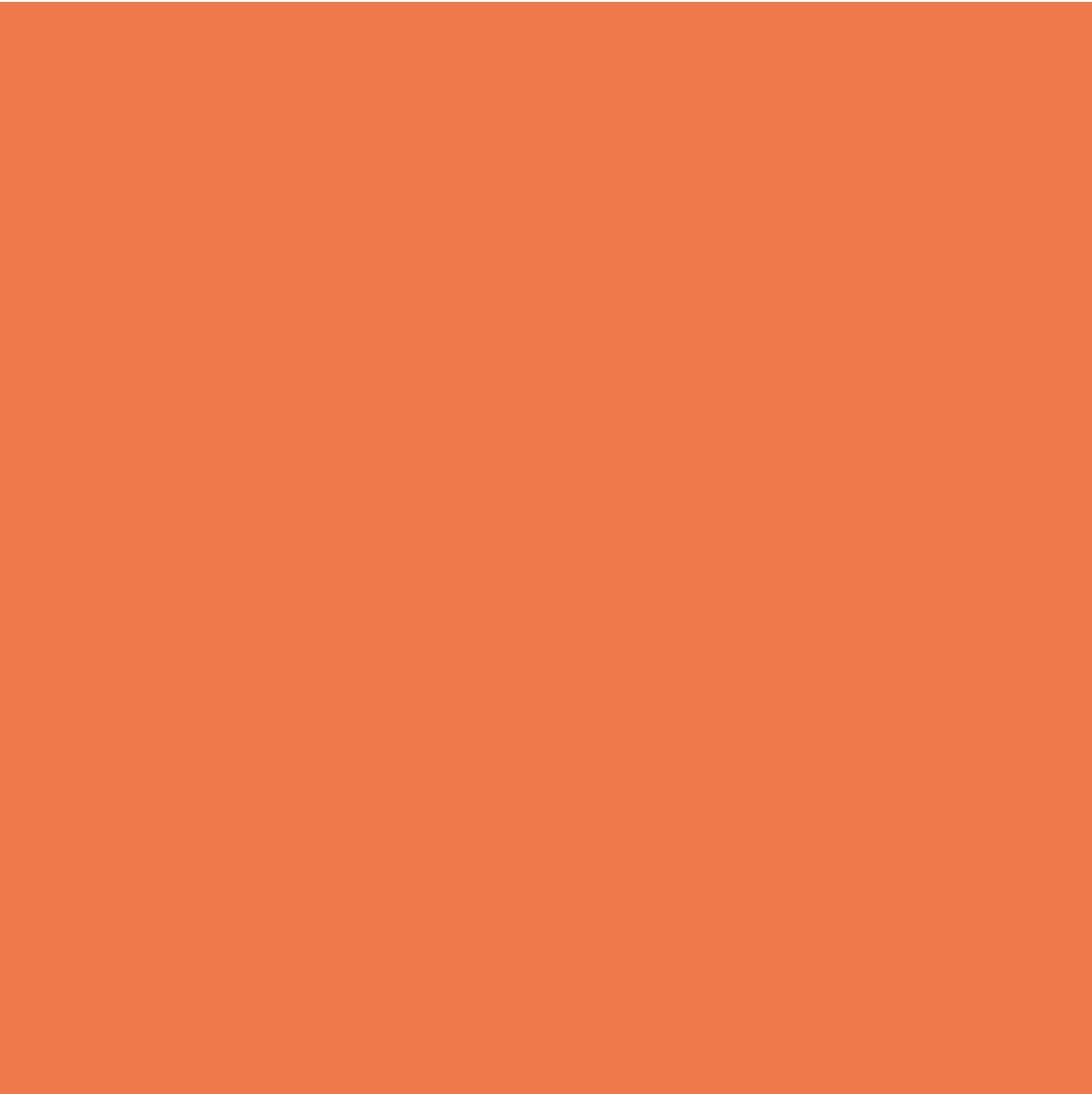Executive officials and government staff are the decision–makers

Communications

The power to influence the values, worldviews, and understandings of the public at large

Corporate

Business management and corporate stakeholders make decisions

Changing States: A Framework for Progressive Governance from The Equity Research Institute at USC

The power that comes from our base needs to operate in multiple arenas, and we often are too in our base building work.

Let's name the types of power we need to build and win, and let's name the role that our base can play in contesting for that power.

Engaging Our Members

Why do we do it?

1

Accountability

Accountable to our members/ base =

Members/base know about andhave real authority and voice in the decisions that are made.

2

Power and Legitimacy Come From Our People

Our Power Resides in our ability to mobilize and organize and our base/members are the center of that work.

3

Independent Resources and Revenue

Dependency on philanthropy makes our work inherently unstable – dues can help to resource us.

IRS Legal Membership vs. Informal Membership

The IRS Defines membership formally for some organizations.

Formal Membership

Members are provided for in bylaws which list out members' powers and rights. Members generally have the ability to select board members and may have control over direction of the organization. Bylaws may establish different categories of membership with differing rights and powers.*

*Thanks to *Bolder Advocacy* for this definition

The Pros of Being a Formal Membership Organization

More generous legal rules for communications about political matters to members

You can invite candidates to talk to your members; you can communicate with members about candidates and positions your organization supports w/o having to track and report those communications

Members have control

Deeper "buy-in" to the organization

Dues

Independent Revenue

The Cons of Being a Formal Membership Organization

Membership Classes

Some members may be treated differently/less favorably than other

Legal Requirements to Follow

May need to hold annual membership meetings or follow other legal requirements

Need to Track Members

This can result in administrative requirements not all organizations are set up to comply with

If you're interested in legally being a membership org then attend our next Webinar with Bolder Advocacy: Navigating the Law on September 22nd:

https://rebrand.ly/membershiplegal

Informal Membership

Most organizations have "informal" membership programs. Meaning we don't design our program to meet the legal IRS definition of a "membership" organization. .

For this training, unless we specify otherwise we are using the informal definition of membership from here on.

ACLU members have informal membership but still are asked to:

Pay dues

Vote on board members

Join different tiers with different rights and responsibilities

Example Group A1

- Members come in through c4 – automatically members of both c3/c4 from there
- Pro: Because the membership sits in (c)4, can share data and members with the (c)3
- Pro: Source of unrestricted revenue for c4/political work
- Members can engage in political activity and develop increasing engagement in power building work and co-governing

Tip

**Origin of your legal structures matters more than you think**

- The legal structure you used to create your membership program in the first place matters
  - **(c)3 Origin**: Most Common: Organization starts as 501(c)3 and adds a (c)4 later – We have seen organizations encounter a host of struggles as they seek to build their (c)4 and engage members in (c)4 activities
  - **Examples**: APEN/APEN Action Fund (CA), Workers Defense Fund/Action Fund (TX)

Origin of your legal structures matters more than you think cont'd

- **(c)4 Origin**: Evolving Today: More and more organizations are starting as 501 (c)4s and/or multi-entity organizations (i.e. with a (c)3 and a (c)4 from the beginning)
- Organizations bring members in through their (c)4 and then make them duel members of the (c)3 – so the membership program runs across both legal entities from the beginning
- There are legal rules about what data/information/resources a (c)3 can share with a (c)4 that engages in political activity – but there are few rules that go the other way – **a (c)4 can almost always share anything with a (c)3**
- **Example:** Kentuckians for the Commonwealth

Break: 10 Minutes
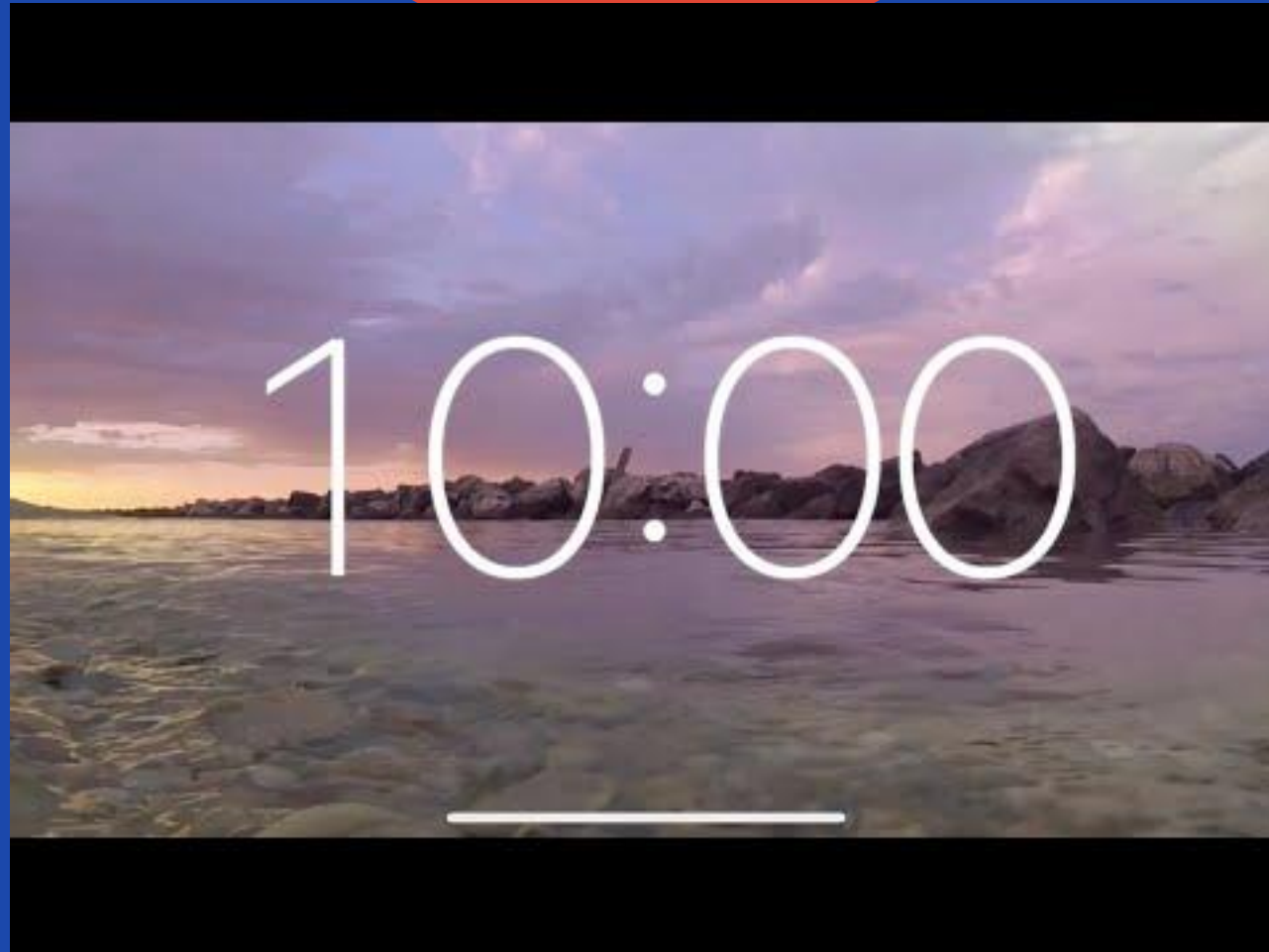
Welcome Back: Let's talk Imperfect Legal Vehicles

Our Main Legal Structures are Limiting

- Nonprofits are legal entities created by Federal Law (IRS) and State Law. They are not created to help us base build
- c(3)s created by the IRS as a means to give tax breaks to rich people
- Both c(3) and (c)4s are highly regulated: Means we often must create multiple legal entities to build power
- None of us would choose to organize ourselves under these structures

501 (c)3

501(c)3 organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office.

- Non-partisan voter education
- Non-partisan voter reg
- Lobbying limited

TL/DR: 501(c)3s can engage in a limited set of power building activities; (c)3s can only talk with supporters about non-partisan activities and ask supporters to do non-partisan activities; supporters cannot be involved directly with most things to do with the election of candidates to office

501 (c)4

501(c)(4) organizations are social welfare organizations that may pursue educational, lobbying, and some limited political activities (as a secondary activity).

- Unlimited amount of lobbying
- Work on passage or defeat of ballot measures
- Partisan political activity

Some 501(c)4 political activity

Endorsement of candidates or opposition of candidates

Partisan voter outreach

Development of a pipeline of good candidates

Establishment and/or management of connected political action committees (PACs)

Contributions directly or indirectly to state or local candidate that permit corporate contributions

Conducting of voter registration or get-out-the-vote drives aimed at supporting a candidate or party

State Law

State Law Nonprofits are created under state nonprofit and corporate law – remember that additional state laws might impact the legal structures you use.

If you are curious about this type of stuff and want to hear more: Please rsvp for the next webinar in this series: https://rebrand.ly/membershiplegal

Base Building Membership Models & How Organizations Define Membership

1

The Few Model

Only Highly-Engaged Community are Members

- Deep base
- Dedicated few
- Superactivists
- Impacted community

Example

Youth United for Change

- Members = Highly engaged
- Youth members sign a contract to uphold tenants and guidelines

CONSTITUENCY

Opportunities:
attend 3 chapter meetings, invite peers to attend meetings, attend rallies or protests

BASE MEMBERS

Expectations:
attend chapter meetings, communicate about attending meetings, uphold community agreements, engage in meetings, follows leadership of the core + LC, attend and participate in planning YUC actions, uphold other expectations as designated by their Chapter's Core Team

Opportunities:
political education at saturday retreats, participation in committees and working groups, resilience activities, cross organizational spaces, semi-regular 1on1s, trips, winter retreat, winter party, BBQ and are eligible for awards based on participation.

CORE MEMBERS

Expectations:
participate in committees (chair them as needed), do turn out or ensure turn out is completed, hold 1on1s, attend core meetings, facilitate meetings, actively participate in campaign work, hold peers accountable to YUC expectations and practices, set up/clean up space, recruit and retain new members and uphold all of the same expectations of base members.

Opportunities:
represent the organization in public (media, panels, orgs, etc) locally or at national events, able to apply for summer work at YUC, able to apply for leadership committee and all other opportunities available to base members.

LEADERSHIP COMMITTEE MEMBERS

Expectations:
attend LC meetings, engages in accountability practices, debate/discuss/vote on organizational decisions, evaluate peers, give Board reportbacks, implement LC tasks as given and all other core member responsibilities.

Opportunities:
deeper political education at LC meeetings, participate in site visits or interviews with funders and all other opportunities available to core members.

Shared with permission from
Youth United for Change:
www.youthunitedforchange.org/

Anonymous Group A2

- Undocumented folks in (c)3 as a place of power for that community -- organization wants to preserve that
- (c)4 Brings in other folks to support the work from that side

2

The Many Model

Broader Community Targets

- The mass base are the members
- A community we hope to be accountable to

Anonymous Group Example

- Base composed of Black folks in an urban region
- Lose understanding of member vs client vs potential client for services
- Few core leaders do critical work
- Mobilize the base around specific topics including elections–but not specific

3

The Many Many Model

Anyone Who did Anything

- Result of ecosystem practices not centering organizing work
- Everyone who has ever been on your email list without unsubscribing
- Extremely common

The Many Many Model Cont'd

- Give them the numbers: but understand the limitations of using the Many Many Model
  - Accountability difficult
  - May be difficult to mobilize or leverage such numbers off an email list
- Best practices
  - Still consider deep base and high engagers
  - Make a plan to engage a portion of your base at a deeper level

Talk About Models: Deeper Engagement

According to Han's research, organizations that did the following had the highest engagement in numbers and length of time*

Build Relationship: Put supporters into contact

Intra-supporter relationships are key to engagement

Give people legitimate roles that expand over time

Also known as leadership development. Great thing to do with members.
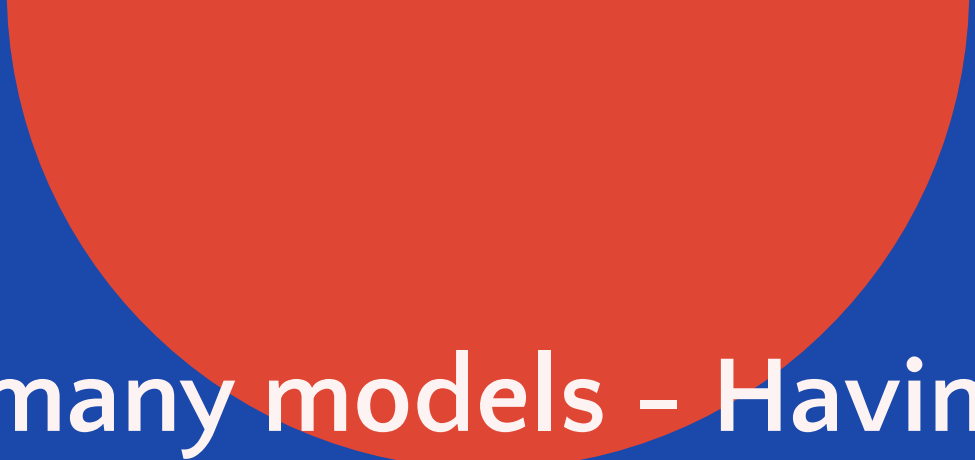
Show supporters they are part of something bigger

Give people a sense of their own power: mobilization is great for this.

*Via *How Organizations Develop Activists*

Deeper Engagement

Deeper engagement becomes more possible when we are more specific about which membership model we're using and why.

–How will we engage at scale with our membership model?

- **Few and many models – Having a few members allows some orgs to be accountable, to deepen and center**
- Many orgs with the Many Many Model struggle with deeper engagement and scaling programs--with the organizing part

15 MINUTE BREAKOUT GROUPS

What are the questions that you want to bring back to your teams to help you better understand how to strengthen your multi-entity base building work?

Ask someone to take notes to drop into the chat when we come back.

Report Back

Type your questions into chat.

BACK TO THE GRIND

Membership Models: Considerations and Steps

STEP 1: CHECK IN

Make sure you have an organizing model that connects to your theory of change.

How does your membership program help your organization achieve the change you want to see in the world?
Who is your base?
Who is your deep base? Be as specific as possible.

STEP 2: ASK WHAT

Ask:
What levers of power do you need to pull to make change?

Membership is not just your field – it is potentially your power – and you have to have a clear strategic vision for what kinds of power you want to contest for

Remember the 6 Arenas of Change

6 Arenas of Change *

Electoral

Voters are the final decision makers

Legislative

Elected officials and policy makers are the decision makers

Judicial

Decision makers are state-level courts and judges

Changing States: A Framework for Progressive Governance from The Equity Research Institute at USC

6 Arenas of Change Cont'd *

Administrative

Executive officials and government staff are the decision-makers

Communications

The power to influence the values, worldviews, and understandings of the public at large

Corporate

Business management and corporate stakeholders make decisions

Changing States: A Framework for Progressive Governance from The Equity Research Institute at USC

STEP 3: ASK HOW

Ask:
How are you going to contest for that power (i.e. core strategies) resource your work?

Ask: How are you going to support your work?
If you have enough supporters to donate: (c)4
Wealthy folks and foundations? (c)3

Potential Activities – A few examples

- Recruiting and running members from your community for public office (c)4/PAC
- Grassroots Lobbying – (c)3 or (c)4
- Ballot Initiatives (c)4
- Drafting or influencing policy (c)4
- Election of progressive candidates (c)4
- Holding progressive candidates accountable (c)3/(c)4
- Protecting elected officials for taking hard votes (c)4
- Changing narrative and culture and telling stories (c)3
- Policy implementation, regulation, and law (c)3/(c)4
- Providing Services and mutual aid (c)3

STEP 4: ASK WHO

Ask:
Get clear about who you are organizing for the above. The important part is defining who the potential member pool is for each entity: It's better to be specific

Three models: Few; Many; Many Many

WHO?

STEP 5: DECIDE

Which legal entities can engage most effectively in the strategies you want to engage in to win?

What legal entities give you to the most flexibility with your resources and data?

If you're already established (c)3, you may need to revisit your membership model.

Decisions decisions...

If you're already established (c)3, you may need to revisit your membership model and make sure that it deeply ties into your organizational vehicles as they are now.

If you started your membership in your (c)4 you may have more options.

Check out the whole Base Power Webinar Series (How to Build Base Power at Multi-Entity Organizations): **https://rebrand.ly/basepower**

WEBINAR 2

501(C)(3) AND (C)(4) MEMBERSHIP PROGRAMS: NAVIGATE THE LAW
September 22, 12pm PT/ 3pm ET
Register at:
https://rebrand.ly/membershiplegal

Please fill out the evaluation!

Thank You To:

- All of our Roundtable Participants and organizations--You know who you are
- Rapheal Randall, Youth United For Change
- Our Base Power Partners: Progressive Multiplier, The Center for Empowered Politics, Alliance for Justice's Bolder Advocacy program, The Movement Tech Help Desk, U.S. Federation of Worker Cooperatives, and Information Ecology

Base Power
Learning Community Members

Base Power
Learning Community

THANK YOU!